Quarterly Strategic Meeting Agenda

**OUR ANNUAL GOALS & YEAR-TO-DATE PROGRESS**

* + - * + Assets Under Management at this point & how we are tracking to the annual goal

Total AUM

Net new AUM

* + - * + Total Revenue at this point & how we are tracking to the annual goal
				+ Total Number of Clients & how we are tracking to the annual goal

Number of New “A” Clients

Reduction or Realignment of Smaller Clients

Number of Referrals

**PROGRESS REVIEW OF OUR QUARTERLY GOALS & INITIATIVES**

* + Carefully review the Quarterly Strategic Progress Tracker:
		- Client Analysis
		- Client Experience
		- Client Onboarding
		- Client Rebranding
		- Marketing & Branding
		- Investment Management
		- Financial Planning
		- Insurance Solutions
		- Technology & CRM
		- Operations
		- Team Development
		- Working with Strategic Partners
		- Other
	+ Share feedback and success stories related to these goals and initiatives.
	+ Discussion & brainstorm any challenges or obstacles related to these goals and initiatives.

**SET PRIORITIES FOR THIS QUARTER**

* + Based on the review of all goals and initiatives discussed above, assess the following:
		- Identify next quarter goals and initiatives
		- Clearly define who is responsible for overseeing it
		- Define Action Items required for achieving completion

**MEETING WRAP UP**