Quarterly Team 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 Item required for achieving completion

**Meeting Wrap Up**