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**