Weekly Team Meeting Agenda

**Upcoming Client Meetings**

* Upcoming Review Meetings with Existing Clients
  + Confirm all meeting preparation and client deliverables
  + Status of New Accounts, Transfer-ins and other business
  + Meeting Follow Up, KYC, Administration, etc.

**Upcoming Prospective Clients**

* Upcoming Meetings with Prospective New Clients
  + Confirm all meeting preparation and client deliverables
  + Status of New Accounts, Transfer-ins and other business
* Upcoming Meetings with Strategic Partners/Centers of Influence
* Other New Business Opportunities

**Ongoing Client Experience**

* Client Profiling & Moments of Truth
* Client Birthdays & Milestones Coming Up
* Relationship Calls
* Other Timely Client Touches (Thanksgiving, Annual Anchor, etc.)
* Upcoming Client Events
* Newsletter
* Client Feedback & Service/Operational Observations

**Team Development & Operations**

* Team Check-In (Task Lists, Projects, etc.)
* Technology Updates
* Upcoming Training, Courses and Conferences
* Holidays and other absences

**Other Important Initiatives**

* + - Documenting Processes for the Procedure Manual
    - Client Conversion to Paperless Statements (or other projects worked on)

**New Items for Discussion**