Weekly Team Meeting

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

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