**Professional Growth Planning Session**

**Annual Agenda**

**YOUR ACCOMPLISHMENTS & CONTRIBUTIONS**

* Discuss your strengths and contributions related to the overall success of the team.
* Discuss your strengths in terms of how they positively impact the client experience.
* Discuss your specific accomplishments during the past year.
* What one thing are you particularly proud of accomplishing?

**CHALLENGES & OBSTACLES**

* Discuss areas for improvement and how focused efforts here will impact your professional success and that of the entire practice.
* Discuss any tasks or projects that were less than successful and identify why they were not successful. Determine what would have helped you make them successful.
* How can we support you in overcoming these challenges or obstacles?
* Are there any other resources or people who can assist with this?

**ADVISORY PRACTICE GOALS FOR THE NEXT YEAR**

* + Define goals & expectation for the advisory practice over the next 12 months.
  + Discuss goals & expectations related specifically to your role.

**YOUR GOALS FOR THE NEXT YEAR**

* Discuss YOUR goals for the next year: Performance, Professional Growth & Development, Practice Management, Technology, etc.

**COMPENSATION REVIEW**

* Base Salary & Benefits.
* Incentives, Retirement Matching, Profit Sharing, Annual Bonus.

**OTHER ITEMS FOR DISCUSSION**

* Is there anything else you would like to discuss?

**MEETING WRAP UP**