**Weekly Team Meeting Agenda**

1. **EXISTING CLIENT PIPELINE**
	1. Upcoming Review Meetings with Existing Clients
		* Confirm all meeting preparation and client deliverables
		* Status of New Accounts, Transfer-Ins and other business
	2. Upcoming Meetings with New Clients
		* Confirm all meeting preparation and client deliverables
		* Status of New Accounts, Transfer-Ins and other business
2. **NEW BUSINESS PIPELINE**
3. Upcoming Meetings with Prospective New Clients (FIT Meetings & Calls)
	* + Confirm all meeting preparation and deliverables
4. Upcoming Meetings with our Strategic Partners/Centers of Influence
5. Other New Business Opportunities
6. **THE CLIENT EXPERIENCE**
	1. FORM & Moments of Truth
	2. Client Birthdays & Milestones Coming Up
	3. Call Rotations
	4. Other Timely Client Touches (Thanksgiving)
	5. Newsletter
	6. Client Feedback & Service/Operational Observations
7. **TEAM OPERATIONS**
	1. Team Check-In (Task Lists, Projects, etc.)
	2. Technology Updates
	3. Upcoming Training, Courses and Conferences
	4. Holidays and other absences
8. **OTHER IMPORTANT INTIATIVES**
	1. Documenting Processes for the Procedure Manual
	2. Client Conversion to Paperless Statements
9. **NEW ITEMS FOR DISCUSSION**