**Quarterly Strategic Meeting Agenda**

1. **TARGETS & GOALS REPORTS**

* + - * 1. Actual number of referrals and new clients received over the quarter

From Existing Clients

From the Financial Planner

From the Branch

From Our Strategic Partners

* + - * 1. Update on current level of all “high level” clients.
        2. Actual versus projected production year-to-date.
        3. Actual versus projected assets under administration year-to-date.

1. **CLIENT EXPERIENCE INITIATIVES**
   1. Review and discuss upcoming or new Client Experience initiatives:
      * Review Meetings
      * Call Rotations
      * Moments of Truth
      * Thanksgiving
      * Newsletters
      * Other
   2. Share feedback and success stories about well-implemented client service delivery.
   3. Discussion & brainstorm any challenges or obstacles regarding ongoing client service delivery and/or operations.
2. **ONGOING ANNUAL BUSINESS ASSESSMENT** 
   1. Review of Annual Strategic Plan to determine:
      * Items completed
      * Revised accountabilities
      * New Action Items required
3. **PROFESSIONAL DEVELOPMENT & OTHER**
   1. Identify meaningful training opportunities, as and when appropriate.
   2. Identify additional credentials and designations you wish to pursue.
   3. Review upcoming travel, conferences, holidays, etc. for the next quarter.