[](http://www.bing.com/images/search?q=images+for+agenda&id=5E1D02527FFCB8F7506C110CDC0087B9B8A974F2&FORM=IQFRBA)**Weekly Team Meeting Agenda**

1. **EXISTING CLIENT PIPELINE (CLIENT REBRANDING)**
   1. Referrals to the MFIS from the Financial Planner
      * Confirm next steps and status
   2. Referrals to the Financial Planner from the MFIS
      * Confirm next steps and status
2. **MENTORING**
3. Investment Management Guidance
4. Investment Management Q & A Session
5. Information Sharing or Upcoming Opportunities related to Investment Management
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. Client Feedback & Service/Operational Observations
7. **TEAM OPERATIONS**
   1. Technology Updates
   2. Upcoming Training, Courses and Conferences
   3. Holidays and other absences
8. **OTHER IMPORTANT INTIATIVES**
   1. Client Realignment Updates (which clients are moving to whom and when)
   2. Documenting Processes for the Procedure Manual
   3. Client Conversion to Paperless Statements
9. **NEW ITEMS FOR DISCUSSION**