**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**