**Weekly Team Meeting**

**Upcoming Client Meetings**

* Upcoming Review Meetings with Existing Clients
  + Confirm all meeting preparation and client deliverables
  + Status of New Accounts, Transfer-ins and other business
  + Meeting Follow Up, KYC, Administration, etc.

**Upcoming Prospective Clients**

1. Upcoming Meetings with Prospective New Clients
   1. Confirm all meeting preparation and client deliverables
   2. Status of New Accounts, Transfer-ins and other business
2. Upcoming Meetings with Strategic Partners/Centers of Influence
3. Other New Business Opportunities

**Ongoing Client Experience**

* + Client Profiling & Moments of Truth
  + Client Birthdays & Milestones Coming Up
  + Relationship Calls
  + Other Timely Client Touches (Thanksgiving, Annual Anchor, etc.)
  + Upcoming Client Events
  + Newsletter
  + Client Feedback & Service/Operational Observations

**Team Development & Operations**

* + Team Check-In (Task Lists, Projects, etc.)
  + Technology Updates
  + Upcoming Training, Courses and Conferences
  + Holidays and other absences

**Other Important Initiatives**

* 1. Documenting Processes for the Procedure Manual
  2. Client Conversion to Paperless Statements (or other projects worked on)

**New Items for Discussion**