**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**