## STRATEGY 6: BUILD AND MANAGE YOUR PROFESSIONAL NETWORK

## Professional Network Meeting Agenda Template

Name of financial advisor's firm

Professional Network Meeting Agenda

Date of meeting

Time of meeting

1. Greeting and introduction
2. Review of the wealth management process and the role of the network in advanced planning
3. How the professional network operates

* Overview of the network model
* Meetings to review cases and brainstorm recommendations
* Documentation of advanced plan with mind mapping
* Frequency of meetings

1. Follow-up on open issues from previous cases
2. Client case 1
   * Presentation of Total Client Profile by financial advisor's name
   * Brainstorming of recommendations by advanced planning category (wealth enhancement, wealth transfer, wealth protection and charitable giving)
   * Prioritization of recommendations
3. Client case 2
   * Presentation of Total Client Profile
   * Brainstorming of recommendations by advanced planning category
   * Prioritization of recommendations
4. Break
5. Client case 3
   * Presentation of Total Client Profile
   * Brainstorming of recommendations by advanced planning category
   * Prioritization of recommendations
6. Client case 4
   * Presentation of Total Client Profile
   * Brainstorming of recommendations by advanced planning category
   * Prioritization of recommendations
7. Schedule next meeting
8. Closing