WEEKLY TEAM MEETING

Suggested Timeline: Every Friday 8:30-9:00

1. Current Clients

- ☐ New Business ($)
- ☐ Annual Client Reviews this week
- ☐ What's new with our clients?

2. Fee-based Business

- ☐ New Client Update

3. Administration

- ☐ KYC Updates
- ☐ Client Issues pending

4. New Business

- ☐ Prospects
- ☐ New Referrals

5. Focus for the week

6. Other