Team Name

Month, Date and Time

1. Review Initiatives

☐ Marketing – text for brochure
☐ Client Retention – Issues or concerns
☐ Investment Management -CPMS Debrief Seminar? Model Portfolios?
☐ IPP Initiative
☐ Insurance – Cases in progress
☐ Finance Assets, Revenues and Priority Households

2. Team Roles & Responsibilities

☐ Kolbe Indexes – completed
☐ Any changes to roles?

3. Issues & Challenges

☐ Client contact schedule – increase outbound calls
☐ A's – staying in touch

4. Administrative Issues

☐ Previous month – admin. – timing sorted out
☐ Focus for the next month

5. Other

☐ Organize Prospects