Sample Agenda:

**Family Summit Client**

**Pre-Meeting**

**Date:** (Date Here)

**Attendees:** (Names Here)

**Agenda:**

* Goal for Summit
* Legacy Will Review (See “Legacy Will Workbook” attached)
* Interview Questions/Content Dialogue (see Key Questions below)
* Estate Plan and Insurance Policy Review
* Approach for Inviting the Kids
* Next Steps

**Please do the following prior to our Pre-Meeting:**

1. **Workbook:** Please answer the questions in the **“Legacy Will Workbook” (attached)** and bring it with you for discussion.
2. **Key Questions:** Please come prepared to discuss your answers to these questions:

* What is the goal for the Summit?
* What would be considered a success out of the Summit?
* Do you want other professionals there?
* What do you want to disclose?
* Tell me about your kids
* What would you want the rest of the family to know if you were to pass away tomorrow?
* What are your biggest concerns?
* How deep do you want to go about estate transfer, etc.?
* What’s off-limits?
* Would it be productive/not productive for your kids to send me any questions ahead of time?