Sample Agenda:

**(Client Name)**

**Family Summit Meeting**

**Date:** (Date Here)

**Time Limit:** 3 or 4 hours per Summit

**Attendees:** (Names Here)

**Agenda:**

* Welcome and Introductions
* Meeting Goals
* Legacy Will/Family Values
* Instructions for the Family (Highlights of what your clients want to focus on – from the pre-meeting Key Questions interview)
* Family Financial Plan Overview
* Questions and Answers
* Afternoon tour of Botanical Gardens (example, if you’re doing an activity)
* Next Steps (about documents, contacts, etc.)

**Post-Summit: Dinner at (XYZ Steakhouse) at 7:00 p.m.**