

Advisory Council Agenda

12:30 Communication Starter & Customer Service Experience

1:00 Introduce new members, review rules and terms, and review last meeting notes

1:30 What makes Carson Wealth:

- Image: brochure, website
- What we do well
- What we can do better
- Email usage

2:30 Client Events

- Guest Speakers
- Wine Events
- Golf Events
- Clients in Body for Life

3:30 Increasing use of our services

- Wealth Management
- Estate Planning
- Tax Planning
- Long-Term Care

4:30 Closing

- Cocktails & Hors d'oeuvres with Staff