

Advisory Council Agenda

11:30 Lunch & Communication Starter led by Ron

12:00 Brief introduction of new council members
Discuss ground rules and terms for Advisory Council
Discuss previous meeting notes

12:30 Client Events

- Body for Life Challenge
- Dr. Bob Froehlich
- Identity Theft Workshop
- Carson Wealth Annual Picnic (Fireworks)
- Half-Time Event
- Holiday Brunch & Silent Auction

Proposed Client Events

- Carson Wealth – Better Bodies Health Challenge Kick-Off
- Carson Wealth – Better Bodies Health Challenge Results Celebration
- Annual Carson Wealth BBQ at Ron & Jeanie Carson's
- Annual Half-Time Report & Wine Social
- Sip & Symphony
- Annual Holiday Brunch

1:00 New CW Division – Enhanced Services Team

- Wealth Planning
- Estate Planning
- Tax Planning
- Long-Term Care
- 401(k)
- Life Insurance

Advisory Council Agenda (cont)

1:30 BREAK

1:45 Facilitated by Dr. Andy Hoh

- What should we continue to do?
- What should we stop doing?
- What should we start doing?

4:30 Wine & Cheese Social with Office Staff