

Advisory Council Agenda

- 12:00** Lunch
Introductions
- 12:45** Ground Rules for Advisory Council
Terms for Advisory Council
Mission & Vision Statements
- 1:00** What does Carson Wealth look like today?
- 1:45** Marketing & Communication Ideas
- 2:30** Model Portfolio Strategies
- 3:00** Where are we going?
- 4:00** What services are most important to you?
Vital or meaningless?
- 4:30** Wine & Cheese Social with the Team