

# Family Summit Meeting Checklist

**Follow these steps, from meeting planning through follow up, to implement a successful Family Summit experience for your clients and their families.**

Assess likely candidates

Discuss Family Summit with clients, gain agreement for a Client Pre-Meeting

Set Client Pre-Meeting date

Prepare and send Pre-Meeting agenda

Conduct Pre-Meeting with the clients

Discuss travel arrangements/make travel plans for the client's kids

Select Summit Meeting date and time

Choose and secure Summit venue

Choose food and beverages (remember dietary restrictions)

Plan activities (if any)

Secure family photographer (if needed)

Review "Invitation Talking Points" for inviting the kids

Invite the kids

Distribute Family Summit meeting agenda

Set-up the meeting environment (display pictures, etc.)

Conduct Family Summit Meeting

Prepare the Meeting Summary

Send clients and kids thank you letters along with a meeting summary/next steps

Record client meeting notes in CRM

Add kids to firm communications/events

Set a family update/check-in meeting, or reminder to check in with the kids within the next year