

AGENDA

1. **INTRODUCTIONS**
 - A. DETERMINE IDENTIFY AMOUNT OF TIME AVAILABLE
 - B. NOTE TAKING RESPONSIBILITY
2. **DISCUSS PARTICIPATION AGREEMENT**
3. **REVIEW OF GROUND RULES**
4. **IDENTIFICATION OF GOALS/INTERESTS**
 - A. WRITE UP GOALS FOR EACH CLIENT
 - B. WRITE UP SHARED GOALS
5. **IDENTIFICATION OF ASSET INFORMATION**
 - A. WHAT IS GATHERED SO FAR?
 - B. WHAT IS NEEDED?
 - C. ANY OUTSIDE EXPERTS NEEDED? (APPRAISERS, PENSION VALUATIONS, ETC.)
6. **IDENTIFY ANY TEMPORARY ISSUES**
7. **RESOLVE TEMPORARY ISSUES, IF NECESSARY**
8. **IDENTIFY LONG TERM ISSUES**
9. **IDENTIFY NEED FOR OTHER TEAM MEMBERS**
 - A. FINANCIAL NEUTRAL
 - B. COACHES
 - C. CHILD SPECIALISTS
10. **IDENTIFY NEXT STEPS IN PROCESS FOR RESOLVING LONG TERM ISSUES**
11. **REVIEW AND SIGN PARTICIPATION AGREEMENT IF APPLICABLE**
12. **DETERMINE NEXT MEETING**
 - A. SET DATE, TIME, AND PLACE
 - B. IDENTIFY HOMEWORK—who will do each task and when will it be completed.

