**SAMPLE Meeting Agenda**

Date:

Location:

Time:

Facilitator: (ex. Trusted Advisor)

Purpose: To open the lines of communication for the Family and Business

Participants: All Family Members

**Agenda Items & time spent:**

\_5mins\_ POSITIVE FOCUS

\_5 mins\_ Expectations for Meeting

\_10 mins\_ Ground Rules for Meeting (ex. No phones)

\_10 mins\_ Understanding purpose of Family Meetings

\_10 mins\_ Each members perspective of Business

\_10 mins\_ Understanding Succession Planning for Business

\_5 mins\_ Summary of Business current situation

\_5 mins\_ Setting future Family Business Meetings (ex every 3 months)

**Next Steps:**

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**Date for next meeting: (3 Months between meetings)**