# MEETING AGENDA EXAMPLE

Meetings ensure a constant flow and monitoring of effective communication. Use a template like the one below to keep everyone on the same page and to clarify the objectives. The fields in red are for you to modify.

**MEETING AGENDA Date: 01/24/00**

Time: 9:00 – 10: 30 am

Recurring: Every Monday

**Type of meeting:** *Weekly team meeting* **Facilitator:** *Person running meeting* **Timekeeper:** *Person keeping time* **Minutes/Notes taker:** *Could be same as timekeeper* **Attendees:** *All in attendance*

## AGENDA ITEMS:

* **Review last week minutes**
* **Outstanding items:** *(Must be submitted by Friday at noon to be on agenda*)
	+ *Segmentation project*
* **New items:** *(Must be submitted by Friday at noon to be on agenda*)
	+ *Implementation training after tax season*
* **Individual updates**
* **Review current week’s calendar**
* **Review next week’s calendar**

## INDIVIDUAL UPDATES:

*Attendee 1 – capture crucial information in this space such as client updates, vacation schedule, conference attendance*

|  |  |
| --- | --- |
| **IMPLEMENTATION** |  |
| **Action Item** | **Person responsible** | **Deadline** |
| * *Junxure project*
 | *John* | *01/31/00* |
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# MEETING AGENDA TEMPLATE 1

**MEETING AGENDA Date:**

Time:

Recurring:

Type of meeting: Facilitator:

Timekeeper: Minutes/Notes taker:

Attendees:

## AGENDA ITEMS:

* **Review last week minutes**
* **Outstanding items:**

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* **New items:**

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* **Individual updates**
* **Review current week’s calendar**
* **Review next week’s calendar**

## INDIVIDUAL UPDATES:

**IMPLEMENTATION**

Action Item Person responsible Deadline

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# CLIENT MEETING AGENDA TEMPLATE 2

Time: Date:

Location:

Agenda Topic:

## PLANNING:

**INVESTMENT REVIEW**

What are your expectations or objectives for this meeting?