

# Driving Growth Through Multigenerational Relationships



## Take Action: Plan and Run a Successful Family Meeting

Organize a family meeting to experience its power to generate important dialogue, illuminate family dynamics and build stronger relationships across generations. This tool will help you envision, prepare for and run an effective meeting.

### FAMILY MEETING CHECKLIST

	YES	NO	TO DO
<b>Research and Family Engagement</b>			
Have you met with each family member individually?	<input type="checkbox"/>	<input type="checkbox"/>	
Have you conducted a social media search on all family members?	<input type="checkbox"/>	<input type="checkbox"/>	
Are you aware of any significant issues within the family?	<input type="checkbox"/>	<input type="checkbox"/>	
Have you reviewed notes from previous family or individual interactions?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there other interested parties that should be aware of the meeting?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Topics and Agenda</b>			
Have you determined the objectives for the meeting and shared with your primary client?	<input type="checkbox"/>	<input type="checkbox"/>	
Have you created an agenda for the meeting that aligns with your primary clients' goals?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Logistics</b>			
Have you selected a convenient and comfortable location?	<input type="checkbox"/>	<input type="checkbox"/>	
Will any type of technology be used during the meeting (i.e., Skype, laptop, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	
Will refreshments/catering need to be ordered?	<input type="checkbox"/>	<input type="checkbox"/>	
Have invitations been sent to each of the attendees?	<input type="checkbox"/>	<input type="checkbox"/>	

*continued*

FAMILY MEETING WORKSHEET AND OUTLINE

<b>Family Name</b>

<b>Meeting Objectives</b>
1.
2.
3.

<b>Topics for Discussion—Exercises to engage family members</b>
1.
2.
3.

Attendees	Additional Information

<b>Logistics</b>		
<b>Date</b>	<b>Time</b>	<b>Location</b>

<b>Ground Rules</b>
1.
2.
3.

<b>Open Items</b>		
<b>Issue</b>	<b>Raised By</b>	<b>Priority Level</b>
1.		
2.		
3.		

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