

- 1. INTRODUCTIONS**
 - A. IDENTIFY AMOUNT OF TIME AVAILABLE
 - B. DETERMINE NOTE TAKING RESPONSIBILITY
- 2. REVIEW AND SIGNING OF 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. DETERMINE NEXT MEETING**
 - A. SET DATE, TIME, AND PLACE
 - B. IDENTIFY HOMEWORK
 - I. WHO WILL DO EACH TASK?
 - II. WHEN WILL IT BE COMPLETED?