**Sample Meeting Agenda**

**Policy Delivery**

* Present new policy schedules
  + Explain changes
  + Discuss policy wording updates
  + How to contact you
* Explain continuation program
  + Show stewardship report
  + Explain how you will work
* Stewardship Report
  + Explain to client
  + Set date for mid-term review
* Referrals
  + Discuss 3-5 specific names
  + Brainstorm
  + Show your ideal prospect worksheet
  + Ask for introduction/referral

**Client policy folder:**

* Schedules
* Wordings
* How to contact you
* Ideal client worksheet
* Articles/special reports of interest