**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