

Agenda – Meeting
(NAME) FAMILY COUNCIL
Date

1. Meeting overview – what would be an ideal outcome for today?
2. Reminders:
 - a. Please turn off cell phones completely
 - b. Begin and end on time (*start time – end time*)
 - c. No interrupting while another has “the floor”
 - d. Practice good listening skills and “reflective listening”
 - e. Be aware of “Communication Killers”
 - i. Using “always” and “never”
 - ii. Asking a question but really making a statement
 - iii. Making “You statements” instead of “owning” your own stuff.
 - f. Everything said today and in all council meetings is to remain between us. Absolutely no sharing outside of this room what anyone has said – to anyone at any time - unless given express permission by the person making the statement. Is it OK with everyone to share with spouses/significant others discussion from today or not?
3. Brief review of Family InterPlay Teammatch and individual styles (if using DNA InterPlay Profiles™)
4. Review Letter of Intent
5. What are the issues potentially looming?
 - a. Next stage planning for family business
 - b. Upcoming roles and responsibilities
 - c. Timelines
6. Reporting of financial information
 - a. What are you presently receiving?
 - b. What would you like to see?
 - c. How would you like to have it presented?
 - d. Who will do this? Who is best equipped emotionally to do this?
7. Future dates and times of Family Council meetings? Setting? Any one else to include? Special requests for food or beverage? Discussion of family roles and expectations of each?