

# Legacy Portrait planning guide

Use this checklist alongside your Family Meeting Guide to help ensure your first family meeting goes off without a hitch.

- Discuss family meeting goals with financial professional
- Decide attendees
- Contact professionals
- Notify attendees of meeting date, location, etc.
- Create/share agenda
- Assign roles to attendees as appropriate
- Document our mission, vision, values, and opportunities on **Page 8**
- Write down our Network of Trust's contact information on **Page 3**
- Record notes from our first family meeting on **Page 10**
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_