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**
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