

Initial Meeting Agenda
XXXXXXX Family XX-XX-XX, 10:00am

1. Intro Statement from professionals
2. Review Collaborative Participation Agreement
3. Review steps of the collaborative process, Pressing Issues, Parking Lot (Flow Chart)
4. Identify Goals
5. What we need to know (Questions to be answered)
6. Discuss utilizing Coache(s), Financial Neutral
7. Set next meeting date(s)