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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