1. Life update - Everyone has a voice
   1. Mental, Physical, Work, Family, Personal Growth (family members rank themselves in these five categories with a score of 1-10)
2. Family Business – Good business sense (may not be necessary depending on your situation)
   1. Family Business
      1. Understanding how the business operates.
      2. Growth opportunities.
      3. Understanding success metrics and key performance indicators.
   2. Rental Properties
   3. Career Growth/Goals
3. Personal Finances – Financial literacy
   1. Budgeting
   2. Power of saving early
   3. Stocks vs bonds
4. Investment Portfolio/Balance Sheet – Upper level management and oversight
   1. Taxable and Retirement Accounts
   2. Rental Properties
   3. Vacation/Leisure properties
5. The Family Bank – maximize your resources (Does it make more sense to loan money internally within the family w/ favorable interest vs using a bank)
6. Risk Management – What could take all of this away?
   1. Estate planning
   2. Competition with family business
7. Giving Back – Make a positive impact together
   1. Charitable goals
   2. Service opportunities
8. Health Check Up – respecting how you treat your body
   1. Dietary
   2. Fitness
   3. Habits
9. Family Vacation – find quality time and experiences to refresh the soul
   1. Future locations and events
10. Activity Update – On the same page
    1. Sync calendars
    2. Bring attention new activities
    3. Respect everyone’s time