**What You Can Expect From Your First Family Meeting**

Your first full team meeting will be very different from all other Collaborative meetings. It is the first time your handpicked team meets together. It is the only meeting for which your team determines the agenda. Working with your team, you will set the agenda for subsequent meetings. Everyone being present at the first meeting really helps us coordinate our work as a team, striving for the same goal: an open, facilitated discussion that addresses your needs and those of your family.

In order to be effective as a team, we have created a procedure intended to elicit everyone’s commitment, yours and ours, to work toward creating mutual understandings that helps you in your decision-making. This procedure helps set the stage for any future meetings.

Shortly before your first family meeting, your professional team will meet separately to coordinate the specifics of the meeting agenda. Because all your team members follow the same protocol, you can expect the meeting to include the following, although maybe not in this exact order:

1. Our responsibilities and commitments to you as a family: Review of Documents
2. You and your family’s goals for the process.
3. What each family member can do to help reach those goals.
4. Valued shared family experiences.
5. Agenda: Topics to discuss: Facilitated discussion to gain understanding
6. Address any topics or issues that the family wants you as the trust-makers to hear.
7. Create a ‘”roadmap” to address those topics.
8. Discuss how feedback will be considered when you and your lawyer and other team members meet.
9. Calendar a feedback session

We hope this helps you understand and gain some comfort in knowing what to expect in this important first full team meeting. We look forward to working with you and your family.

Sincerely,

Your Collaborative Team