

Monthly Executive Meeting Agenda

SAMPLE - IPWM

Items to accomplish:

- Monthly compliance checklist – See Smart RIA
- Review practice financials (balance sheet, P/L, statement of cash flow) – Pull from Quickbooks
 - Budget to actual
 - Profit/loss
 - Statement of Cash Flow
- Review asset inflows/outflows in Orion (Trends app)
- Firm software updates, release notes, etc
- Other compliance or “on the business” tasks.

KPI's to review:

- Number of Triage Appointments booked:
- Number of OPP delivered:
- Number of FPEs signed:

Marketing Review

- Podcast downloads (See Libsyn)
- New newsletter subscriber increase (Active Campaign)
- Website impression and audit review (Google Analytics)



Accounts ▾ Activities ▾ Co

Workflow Task Report - filtered

Showing 1 to 50 of 133 entries

TASK DUE DATE	TASK NAME	C
01/18/2022	Contact client	S
01/18/2022	Adjust target date	S
01/18/2022	Prefill Setup worksheet (started, doc is in McDonald folder under FEC 401k, Ret Plan ER)	P
01/18/2022	Place trades	T
01/18/2022	Place Trades	T
01/18/2022	Place trades	T

FILTER OPTIONS

Due Date

to

« January 2022 »

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

Assigned to User

Assigned to Team

Include

