

# The Annual Family Meeting Agenda Template

**Crespo Capital**

A structured guide for productive conversations  
about your family's legacy.

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A successful multi-generational wealth strategy is built on a foundation of clear communication and shared values. The annual family meeting is the most effective forum for these crucial conversations.

This template provides a structured agenda to help guide your discussion, ensuring all key topics are addressed. Use it as a starting point to create a tradition that will strengthen your family and secure your legacy for generations to come.

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**Crespo Capital**

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This organizer is for informational purposes only and does not constitute legal or financial advice.

# Meeting Agenda

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## I. Review of Family Values & Mission Statement

Revisit and discuss the core principles that guide your family's decisions. Is our current mission statement still a true reflection of our collective values?

**Key Discussion Points & Notes:**

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## II. Financial & Investment Review

A high-level review of the family's overall financial health and investment performance. (A detailed review should be conducted separately with your advisor).

**Key Discussion Points & Notes:**

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## III. Estate & Legacy Plan Update

Discuss any changes in family circumstances (births, marriages, etc.) and review the current structure of wills and trusts to ensure they align with your wishes.

**Key Discussion Points & Notes:**

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# Meeting Agenda (Continued)

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## IV. Philanthropic Goals & Initiatives

Review the performance of past charitable giving and discuss goals for the upcoming year. Is our giving strategy creating the impact we desire?

**Key Discussion Points & Notes:**

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## V. Next Generation Education

An open forum for younger family members to ask questions and a dedicated time for educational topics, such as financial literacy or the family's business history.

**Key Discussion Points & Notes:**

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## VI. Action Items & Next Steps

Summarize the key decisions made during the meeting and assign clear action items and deadlines for the year ahead.

**Action Items:**

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