



# Weekly Meeting Guide

## Elements of a Successful Meeting:

- \* Neutral environment – don't meet at the same table where you may have fought about money in the past
- \* Light and fun atmosphere – it's ok to sit by the fire or go for a walk
- \* Don't go to the meeting hungry and/or have a snack during
- \* No distractions
  - Phone's and technology off (except calendar resources)
  - Young kids in bed or entertained
- \* Be Prepared - Come to meeting with a question or topic

## Agenda Ideas:

- \* Set the mood
  - Discuss your Why – Focus on where you are going
  - Celebrate successes
- \* Go into Topics (next page)
- \* Set next week's agenda
- \* End meeting on a positive note

Want more tips, sign up for the Stewardship Tips at  
<https://inspiredstewardship.com>

Meeting Topic Ideas (you don't need to cover all of these, they are simply ideas):

What do we need to ask our financial coach? Create a list.

Calendar

Who's taking the kids where

What activities, dinners, gatherings are coming up

Meal Planning

Re-Align on Why (what's important to you)

Celebrate successes – Add to your celebration list

Discuss challenges you had during the week and how we can improve

Love Language Quiz

Money Language – Discuss the homework your Coach Connection coach gave you to improve your relationship

Finances (This is not the monthly budget meeting)

Priority List update

Budget check-in

Envelope status

Upcoming dollar amount threshold items

Other Tips/Suggestions:

Have Fun

Come up with the meeting agenda for the next week and post it

Write topics on the agenda during the course of the week so you don't forget to discuss it

Consider switching who is in charge of the agenda/topics/discussion for the week