

Chicago Trustee Collaboratory
Meeting Agenda

February, 2015

MISSION: The **Chicago Trustee Collaboratory** is organized to help families flourish in the trustscape. We do that by articulating, advancing and implementing best practices and practical wisdom for trust administration. Our approach is focused on ongoing peer-to-peer discussions, trainings and on-line content.

Our VISION is to be the leading resource for trustee knowledge. We develop and produce content in various forms - such as video's, written articles, and blogs. We also curate the content of others. We provide the wisdom that families, their trustees and advisors need.

1. **Welcome:** Reading our Mission & Vision!
2. **Our Evolving Collaboratory:**
 - a. **Report on Last Month's topic and article**
 - b. **Committee Reports**
3. **TOPIC: Getting the word out to help families** – Last month we looked at the key questions to be asked around our practice. But who else can ask those questions besides you? And where should you ask besides one-on-one? And is it only about the questions, or is there a place for telling your story? Or the stories of some of your other clients?

Looking more deeply from the perspective of your practice and your professional mission, how can you better educate and market?

And how does this apply to the Collaboratory as a whole? Especially to enhance the impact of the Collaboratory.

We'll use the survey results as well as the embedded expertise of our internet market strategist Mark Fabish, along with the varied experience of our members to help you and the Collaboratory.

So, register now to use the Collaboratory as your laboratory to help get the word out!

ANNOUNCEMENTS & REMINDERS:

- Our next Collaboratory meetings:**
LOOP: the 2nd Tuesday: March 10th and April 14th
North Shore: the 3rd Tuesday: February 17th, March 17th & April 21st
- Our next COMMITTEE MEETINGS:**
Content Committee: February 10th at 10 am
Meeting Programming Committee: February 10th at 2:30pm