Chicago Trustee Collaboratory   AGENDA: January 13 & 20, 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. **A funny thing happened at our last meeting….**The things that can happen when a stranger comes into the family! A stranger can be a new person or a new plan.   As trusted advisors and as family members in the CTC, how do we handle that?   **Harold Rice-Erso** will employ his professional expertise to lead a short discussion, involving us in some sharing, listening and asking some questions. Though it's unlikely that we will come to a clean resolution or a solution or complete clarity over all the feelings and issues exposed in December, he may just help us to start some understanding and healing.**Open trust issues**: Questions, Success Stories, Opportunities for Learning

2. **TOPIC: What are the questions?** What are the questions that we need to ask families? What are the questions that we need to ask other advisors?

   Conversations start with questions. What if we asked better more thoughtful questions in the estate planning and trust administration process?   Could our client families enjoy better outcomes?

   Steve Sawyer with **Siree Sandburg Bakkos** & **Sue Rhomberg** will facilitate and document our thoughts.

We intend our lists (with attribution) to be part of published content in paper and on-line – including in our 2015 Resource Compendium.

3. **ANNOUNCEMENTS & REMINDERS:**
☐ **Have you renewed? $200 for 2015.**
☐ **Our next meetings**: LOOP: the *2nd* Tuesday: February 10th
☐ **North Shore**: the *3rd* Tuesday: January 20th & February 17th