Family Meeting Agenda and Monthly Check

Companion download for LoftyBiz 146 — Business and Family: Don't Run Home Life on Autopilot

Your task for this week. Pick a time for your first family meeting and put it in the calendar like a client appointment. Write a four-line agenda: wins, calendar, money, one-on-ones. Then choose the first Sunday of next month for your own audit. Write three lines about who you want to become, and check last month's calendar and card statement against them.

1. Weekly family meeting agenda

Same order every time. Phones in another room. On a busy week the meeting gets shorter. It never gets cancelled.

Item	Time guide	This week's notes
Wins. Each person names something that went well this week, at work or at home.	A few minutes	
Calendar. Look at the coming week together. Solve clashes now, not in a rush mid-week.	The main block	
Money and goals. Ten minutes on the family budget and one shared goal.	About 10 minutes	
One-on-ones. After the adult part, a short one-on-one with each child, if you have children at home.	About 15 minutes each	
Busy week? Keep wins and the calendar only, and keep the meeting shorter, not cancelled.	As short as 20 minutes	

2. Monthly calendar and spending check

On the first Sunday of the month, take about forty-five minutes. Write three lines about who you want to become. Tag last month's hours and spending. Then move a little toward that person.

Step	Prompt	Your notes
Write it	Three lines: who do you want to become?	
Tag it (time)	Go through last month's calendar. Investing if it moved you toward those lines. Distraction if it did not.	
Tag it (money)	Do the same with every line on last month's card statement.	
Move it (time)	What will you cut, and what will you put in its place?	
Move it (money)	What will you cancel or reduce, and where will that money go?	
Repeat	First Sunday of next month, about forty-five minutes. Put it in the calendar now.	

These are examples, not promises. Figures in the video are rough examples, not targets or forecasts. This is general business education, not financial, legal, HR or tax advice. Results vary.

Save your family-meeting agenda and monthly check steps as SOPs in Systex, our own product. You can find Systex at loftybiz.net. Click the link in the description.