



2025 MEETING SCHEDULE:

| Client Meetings 7:15 to 9:00 PM | Advisor Roundtable 6:00 to 7:00 PM | Advisor Retreat 9AM to 12:30PM | Trustee Meetings 6:30 to 7:30 PM | Leadership Team TBD |
|--|---|---|---|--------------------------------|
| 1/6/2025 | | | | |
| 1/20/2025 | 1/20/2025 | | | |
| 2/3/2025 | | | | |
| 2/17/2025 | 2/17/2025 | | 2/10/2025 | |
| 3/3/2025 | | | | |
| 3/17/2025 | 3/17/2025 | | | |
| 4/7/2025 | | | | |
| 4/21/2025 | Combined with retreat | 4/19/2025 | | |
| 5/5/2025 | | | | |
| 5/19/2025 | 5/19/2025 | | 5/12/2025 | |
| 6/2/2025 | | | | |
| 6/16/2025 | 6/16/2025 | | | |
| 7/7/2025 | | | | |
| 7/21/2025 | 7/21/2025 | | | |
| 8/4/2025 | | | | |
| 8/18/2025 | 8/18/2025 | | 8/11/2025 | |
| 9/1/2025 | | | | |
| 9/15/2025 | 9/15/2025 | | | |
| 10/6/2025 | | | | |
| 10/20/2025 | Combined with retreat | 10/18/2025 | | |
| 11/3/2025 | | | 11/10/2025 | |
| 11/17/2025 | 11/17/2025 | | | |
| 12/1/2025 | | | | |
| 12/15/2025 | 12/15/2025 | | | |

NOTES:

- All meetings from January through April will be Zoom Meetings unless otherwise communicated in advance.
- Meetings highlighted in yellow are not conducted on Mondays
- Advisor retreats will be held on Saturdays and will take the place of the advisor meeting in that month