




North America: HTG Meeting Preparation



✓	TO DO	Details and Dates
	<p>PREPARE TO TRAVEL</p> <ul style="list-style-type: none"> • Click here to register for meetings and complete hotel reservation • Make flight reservation 	<p><i>Hotel cutoff is April 6, 2018</i></p> <p><i>Registration cutoff is April 9, 2018</i></p>
	<p>COMPLETE APPLICABLE 4 PLANS</p> <ul style="list-style-type: none"> • Click here to complete your Business Legacy Plan • Draft Business Legacy Plan (as directed by facilitator) <p>From prior quarters:</p> <ul style="list-style-type: none"> • Click here for Life Plan • Click here for Personal & Business Legacy Plan 	<p><i>Save plans to your group's principals' folder on Anchor. Click here & choose "Anchor Login" at top right of screen.</i></p> 
	<p>ENTER SLI DATA</p> <ul style="list-style-type: none"> • Click here for your SLI data entry 	<p><i>April 5 – 15, 2018</i></p> <p><i>Sign in using your assigned credentials</i></p>
	<p>FILL OUT INITIAL MPD PORTIONS</p> <p>Sign in and create your MPD</p> <ul style="list-style-type: none"> • Send scorecard links to your spouse/family (1) • Send scorecard links to employee/manager (Up to 5) • Complete all but SLI data entry section 	<p><i>Click here & choose "MPD Login" at top right of screen)</i></p> 
	<p>SLI BOOKS ARRIVE IN YOUR INBOX</p> <ul style="list-style-type: none"> • Review your financial performance — and your peers. • Make notes of any questions you would like to ask at the meeting. 	<p><i>April 25, 2018</i></p>
	<p>COMPLETE MPD</p> <ul style="list-style-type: none"> • Finish filling out SLI data entry section • Create PDF and upload to Anchor 	<p><i>Click here & choose "Anchor Login" at top right of screen.</i></p> 
	<p>REVIEW OTHER MEMBERS' MPD's</p>	<p><i>Be prepared for the meeting.</i></p>
	<p>PREPARE GROUP SPECIFIC ASSIGNMENTS</p> <ul style="list-style-type: none"> • Complete any other preparation specific to your peer group 	