AGENDA FOR SECOND JOINT MEETING

Tommy Norris and Angela Norris

Carol Mapp, Facilitator (MHP) · Jennifer Failla, Financial Neutral
Cristi Trusler, Attorney · Carlos Salinas, Attorney

Friday, June 12, 2026 · 9:10 a.m. · Dallas, Texas

---

1. Check in with clients and confirm the length of today's meeting.
2. Approve minutes from the first joint meeting. Assign minutes.
3. Confirm or revise the clients' goals.
4. Review where we are on the Road Map to Resolution.
5. **Financial estate walk-around** — building a shared understanding of the marital estate (no decisions today):
    a. Household income overview
    b. The marital estate — home, retirement and pension, RSUs, the family trust, the QOZ investment, vehicles, and debt
    c. Monthly cash flow
    d. Looking ahead: funding two households
6. Discuss the status of professional fees.
7. Create a list of assignments, including documents to gather and budget worksheets to complete.
8. Discuss known agenda items for the next joint meeting.
9. Ask and address any questions.
10. Debrief.