### Before Meeting

- Was prep email sent?
- Do we have any info that is already in team folder, redtail?
- Any other background info that would be helpful? *what would support advisor need to know*

### During Meeting

- *Client should talk 90%, advisor talks 10%*
- *Client should leave with minimal homework – be sure to get as much info as possible before the meeting and during this*
- Approach language:
  - Transparent fee structure
  - Transparent process description
  - Clear language on finding right advisor fit

- Goal setting and gathering financial facts:
  - Clear short-term goals
  - Mid-term goals
  - Long-term goals
  - If you do not have balance sheet from initial email, then make sure you fill in missing pieces by asking (buget, balance sheet, copies of tax returns, estate plan, insurance, etc.)
During Meeting

- Top 5 Values (only if have time)
  - Top 10, then get down to top 5
  - What are top 5 values?
  - Why is each value important?
  - Ask for example of when it was most present in their life?
  - How are values present currently in life?
  - What would need to happen to progress to a 10/10 on each value?

- Thought provoking questions – ask min. of 3
  - Time exercise (24 hours pre and post retirement)
  - Financial independence approach to retirement
  - Competing goals question
  - Ask for rank (spending vs. legacy)

- 5. Next steps
  - a. Nice follow up email/ discovery letter, schedule next meeting there, and email what is needed, (but don’t let it hold up process)/ this will be mainly sending E MONEY link and then asking for statements.