Before Meeting

- Was all info received, or are we presenting rough draft plan? If rough draft, bring up info we need again. Fill it with the contents of your meeting.

- Are both spouses there? Very important as no decisions will be made with 1 spouse.

- Make sure all requests fulfilled by CFP team

During Meeting: Stage 1

- Ask if any philosophy changes from first meeting

- Repeat top 5 values and top goals

- Give clear outline of discussion today

- Present current plan status – where are finances without you in picture? Current stress test.

- Present overall 2nd plan: a. Roadmap if we handle finances b. Embed compelling reasons of why they should work with us
Advisor Checklist

During Meeting: Stage 1

- Detailed discussion on: a. Roth. Vs. Pretax b. Investment philosophy c. College planning philosophy (if relevant) d. Life insurance philosophy e. For all of these make sure these fall in line with follow up emails

- Make sure all follow ups are scaleable and systemized.

During Meeting: Stage 2 (if needed/possible 2nd close meeting)

- Answer questions

- Get action

- Get info a. Fill out client info sheet b. Any info not present, create a list and let client know that you’ll need it before moving forward with planning/onboarding

- Explain the team: a. Will have own advisory team to help through entire processes b. Expectation of 48 turnaround from client

- Explain next steps
# After Meeting

- **Copytalk**

- **Follow up email**

- **Update notes in calls (google sheet) if client not committed yet**
  - if client has committed, they get moved to case open inventory/ start onboarding

- **Include detailed follow up email to client and to our team**
  - intro, what we are doing, and clear and as much detail as possible on what we are doing, etc.

- **Include separate emails all follow up emails like**
  - Copy of plan
  - Roth philosophy
  - Videos
  - Fee recap/ value prop
  - Direct indexing

  (This may be part of first close or maybe all of this happens at once)

- **Do client onboarding email**

- **Clean up open inventory entries**

- **Client onboarding. (if commitment made)**