

# Our Financial Planning Sales Cycle

## 01 | Get Acquainted Meeting

Initial client meeting to understand their personal and financial circumstances. This is a no pressure and no obligation meeting; instead is an opportunity for potential clients to ask their questions and we'll do the same.

**Timeframe - 1 hour**

**Follow up with Better Proposal Template within 24 hours of meeting (customized based upon meeting).**



**Use Template Prospect Agenda**

## 02 | Ask ?'s Meeting

Follow up to Get Acquainted Meeting, giving, potential clients the time to ask any questions that came up as a result of our Introductory meeting.

**Timeframe - 30 minutes**

## 03 | Discovery Meeting

Working with our advisor team to identify and select future goals, as well as collect any remaining information needed to prepare plan.

**Timeframe - 1 hour**



**Sign one-time Planning Engagement (average fee is \$2,500 but increases with complexity).**

## 04 | Planning Meeting(s)

Review plan with client to determine their current financial scenario and prioritize goals and objectives. This could be anywhere from 1-6 meetings based upon complexity and topics to discuss. This can also be a continuum of the Discovery Meeting in order to gather information incrementally.

**Timeframe - 1 hour per meeting**

## 05 | Implementation Meeting(s)

Review important recommendations for their personalized financial plan, ensuring questions are addressed for financial success.

**Timeframe - 1.5 hours**



**This is generally when we convert prospect to client.**

## 06 | Progress Meeting

Monitor progress and updates as needed.