# Prospect Client

## Wednesday, December 13, 20XX

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| #1: Your Goals, Objectives and Thoughts on the Future* Family
* Occupation
* Recreation
* Dreams
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| #2: Our Team* Wealth Planner, Strategic Planning Analyst, Associate Advisor, In-House CPA
* Duncan Financial Group
* Coordination with your Team of Professionals
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| #3: Our Comprehensive Approach* Assess, Evaluate, Protect, and Optimize – Both now and on-going
* Wealth Management Approach
	+ Independence
	+ Fiduciary Guidance
	+ Investment Policy Committee
	+ Alternative Investment Options
* Business Owner Planning Strategies
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| #4: Next Steps* Expectations Moving Forward
	+ E-mail Proposal from Today
	+ Schedule “I’ve Got ?’s Call”
	+ Conduct “I’ve got ?’s Call”
	+ Final Decision: Go / No Go
* Identify Priorities
* If you decide to work with us, looking 3 years out, what would you say needs to happen for you to call this successful?
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Presented by: Brian D. Duncan, CFP®

THANK YOU FOR YOUR Consideration!