

# 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.

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



Use Template Prospect Agenda

Timeframe - 1 hour

## 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.



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

Timeframe - 1 hour

## 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.