

THE NEW CLIENT MEETING

With Heather!

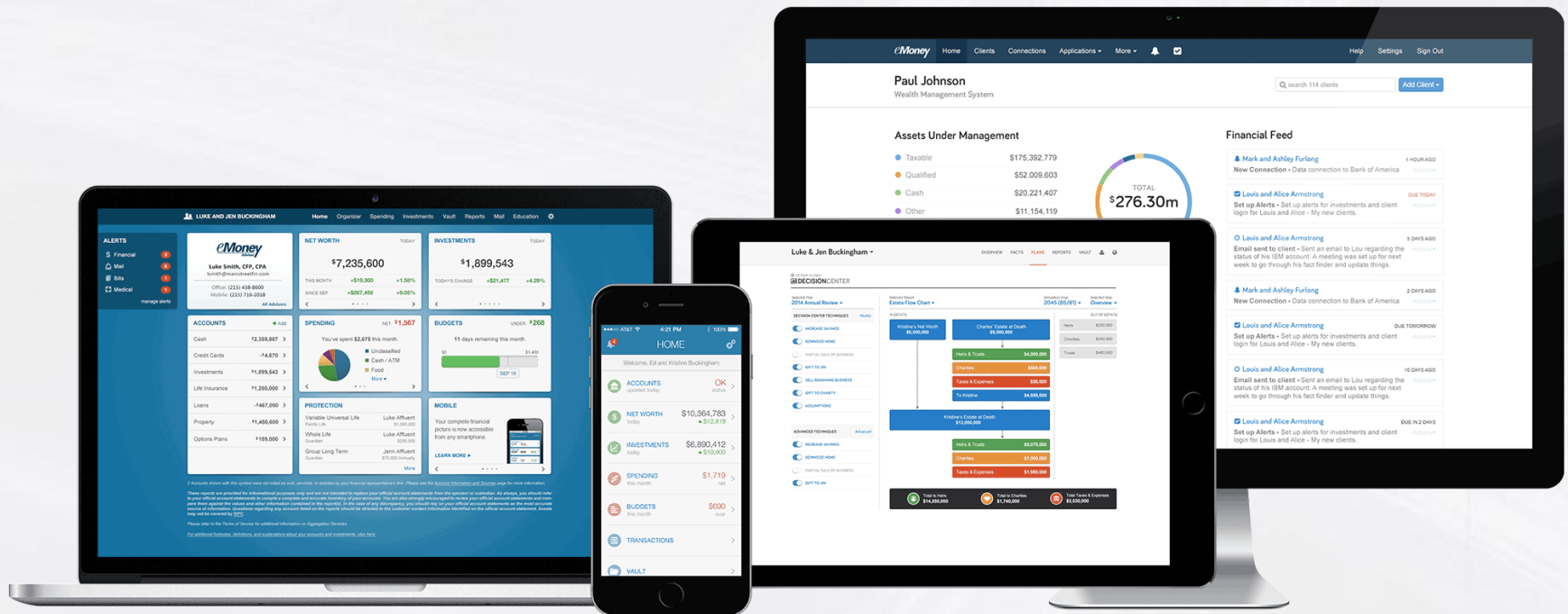
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The New Client Meeting



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Old Client Meeting Stereotypes

- A lot of paper and forms your client fills out.
- The lack of engagement in regards to planning and up to date data.
- Focusing on client rather than client and spouse,
- Having to print out 50 pages of reports to show the client what you have done for them.

“How we communicate is driven by the client”

said Ron Carson, CEO of Carson Wealth

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Three Client Meeting

- **Annual Review**
- **Virtual Meeting**
- **Prospect Meeting**

Annual Review – The Peterson's



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The Old Way



Charles and Katherine Burke | OVERVIEW | FACTS | PLANS | REPORTS | VAULT

Net Worth
\$19,833,263 as of today
+ \$16,480 this month
+ \$4,938,398 since Jan 2014

Investments
\$6,201,648 as of today
+ \$16,480 this month
+ \$3,708,263 since Jan 2014

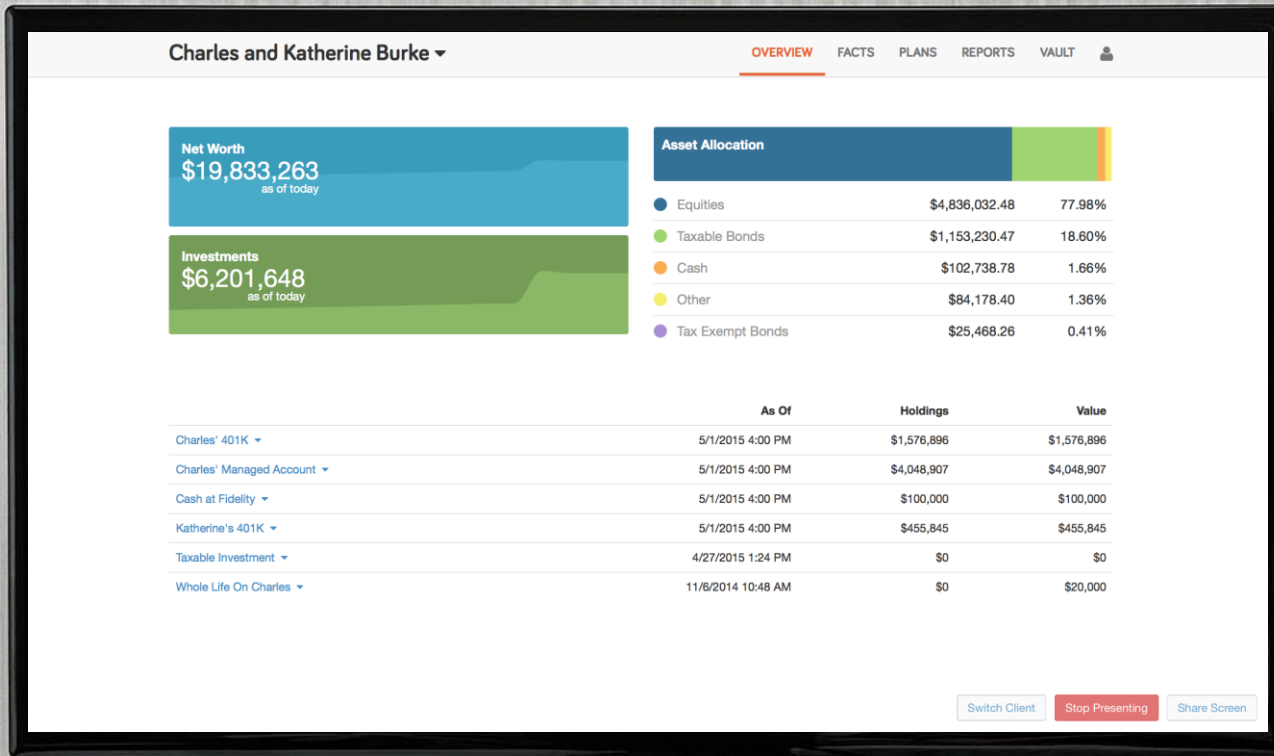
Asset Allocation

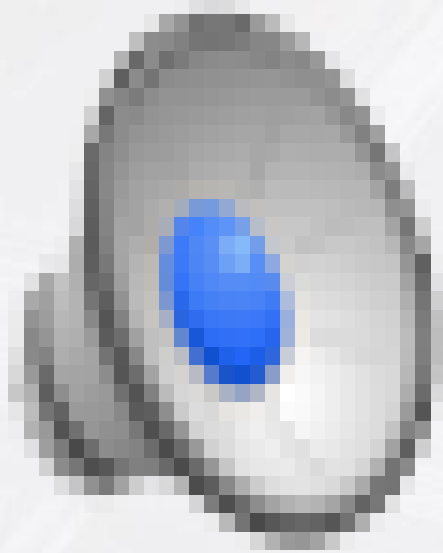
- Equities: \$4,836,032.48 (77.98%)
- Taxable Bonds: \$1,153,230.47 (18.60%)
- Cash: \$102,738.78 (1.66%)
- Other: \$84,178.40 (1.36%)
- Tax Exempt Bonds: \$25,468.26 (0.41%)

	As Of	Holdings	Value	Today's Change
Assets Under Management				
Charles' 401K	5/1/2015 4:00 PM	\$1,576,896	\$1,576,896	+ 00.50%
Charles' Managed Account	5/1/2015 4:00 PM	\$4,048,907	\$4,048,907	+ 00.89%
Assets Held Away				
Cash at Fidelity	5/1/2015 4:00 PM	\$100,000	\$100,000	--
Katherine's 401K	5/1/2015 4:00 PM	\$455,845	\$455,845	--
Taxable Investment	4/27/2015 1:24 PM	\$0	\$0	--
Whole Life On Charles	11/8/2014 10:48 AM	\$0	\$0	--

The value shown for "Today's Change" reflects the percentage change in price for positions that updates during the current session since the last market close. After market close, the "Today's Change" value reflects the cumulative total of changes for bonds and mutual funds. Note that many mutual funds are updated within several hours after market close. Securities

Start Presenting (highlighted in red circle)





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Virtual Meeting – The Martins

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Are you saving enough for retirement?

- 1 Intro
- 2 Your strategy
- 3 Next Steps
- back to workshop



Take a look at your retirement strategy.

Find out how much your retirement will cost and see if you're on track to afford it

Before you begin
make sure these Organizer sections are complete:

- \$ Accounts
- Family & Friends
- Lifestyle

- ▶ How do I set up a **retirement savings plan**?
- ▶ Smart **investing** to maximize money.
- ▶ Should you count on **Social Security**?

46% of workers have **LESS THAN** \$10,000 in retirement savings. 29% have **LESS THAN** \$5,000.
EBRI Retirement Confidence Survey – 2011

Contact Advisor

Learn about Retirement

Are you saving enough for retirement?

1 Intro 2 Your Strategy 3 Next Steps back to workshop

Customize your retirement strategy

Adjust these items to see their impact on your retirement.

Retirement Ages	65 / 65 >
Yearly Retirement Expenses	\$100,000 >
Existing Savings	\$1,017,771 >
Monthly Contributions	\$3,696 >
Yearly Retirement Income	\$63,000 >
Inflation & Growth Rates	3.72% / 3.72% >

Possible options for achieving your goal

- Increase Investment Account contributions to \$6,115 per month.
- Reduce retirement expenses to \$79,000 per year.
- Delay John's retirement until age 75.

How long will your savings last?

2029 John is 65 Retirement begins

2061 John is 67 Funding runs out

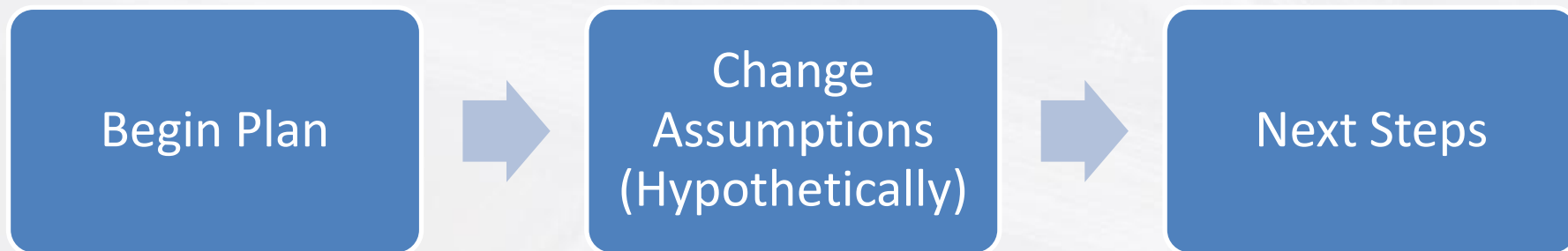
Your funds will run out when John is 87.

What you'll need by 2029: \$3,809,813
You'll be short by: \$1,316,768

Years Assets Details

Next Steps

Workshops



Prospect Meeting

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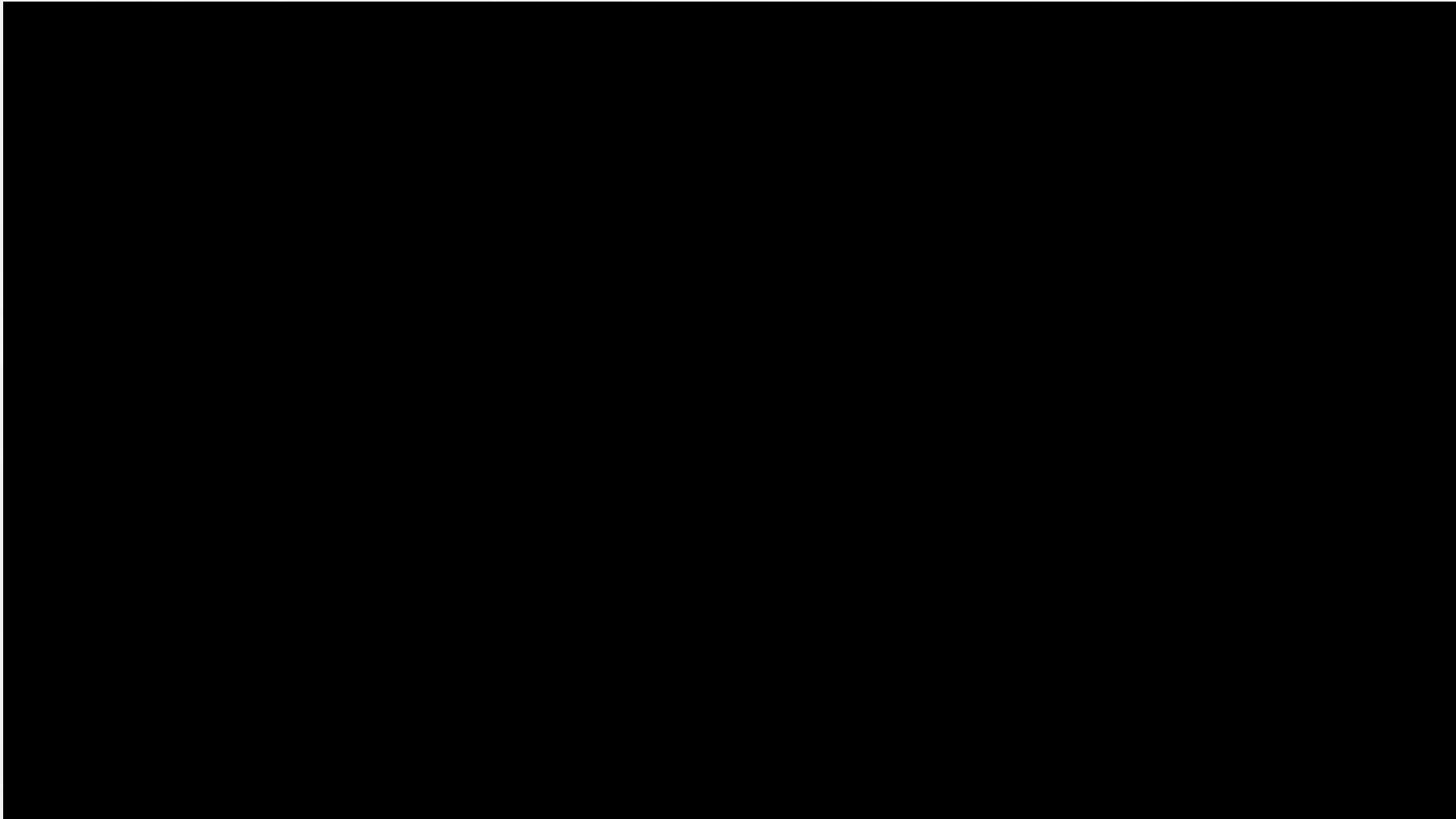
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Key Points

Interactive Planning

Engage Your

Clients

Utilizing Technology – Excite Your

Clients

Attendee vs.

Client & Spouse

Participant

Put Your Clients at

Ease