**Review Meeting Script for MFIS**

*Purpose: To conduct consistent Review Meetings for your high value clients.*

*It is important to remember you are not required to recite this script word for word. Use this script to guide your meeting. Your goal is to personalize this script so that it feels natural for you.*

**Instructions:**

This document has 2 types of text.

* Your script (what you would) is in regular text type.
* Your instructions for actions are in ***bold italics****.*

GREETING

***Welcome client and establish a rapport with them.***

* Hello Mr. and Mrs.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, it’s good to see you again.
* How have you been?

***Make small talk (weather, sports, families, anything to establish common ground) – no more than a couple of minutes.***

# MEETING OVERVIEW

* Here is the agenda for today’s meeting [***give them a copy of the agenda***].
* First, we will review your Goals and Objectives and discuss exactly what we are doing to help you achieve them. We will also talk about anything new that might be important to you and answer your questions.
* Then, I’ll remind you about our Wealth Management Continuum and how we help you help those that are important to you.
* Do you have any questions before we begin?

2. HELPING YOU ACHIEVE WHAT MATTERS MOST

**YOUR PERSONAL FINANCIAL ORGANIZER**

* *This is the PFO Mini (2-page summary) for your clients.*

Review Your Goals *– What’s Important to You?*

* + - In our last meeting, we talked extensively about what is important to you.
    - You indicated that: ***summarize the goals they identified*.**
    - It’s been a year now since we’ve discussed these goals. Do these goals accurately reflect your expectations and needs of today? Or, has anything changed with respect to your goals that I need to be aware of?

***If there are changes explore these by questioning them as you did before.***

**What We Are Doing to Achieve Your Goals**

*Provide your client an overview of their current financial solutions and the action plan/strategies that you are using. Include a review of all assumptions.*

*Review and discuss any requirements for proceeding with changes.*

**Anything New You Would Like to Discuss**

*Identify if there are new areas the client needs your help with and begin to move down that new road with them – providing advice and solutions.*

# ACCOUNT ADMINISTRATION & PERSONAL UPDATES

*Address any administration or paperwork that needs to be updated or completed.*

*Pay close attention to FORM updates and other personal information shared.*

# A QUICK REMINDER

# Managing Your Significant Life Events

* Just to remind you about our approach to Wealth Management, I am here to help you prepare for or react to Significant Life Events -- basically anything and everything that pertains to and affects your finances either now or in the future.
  + It could be saving for retirement, planning for a child’s education, getting a raise or even losing a job.
* Our purpose is to cushion the effects of the Significant Life Events so you stay on track and reach your financial goals and objectives.

# Our Introduction Process (For discussion with your high value clients only)

*Be very low key and relaxed. Be as a matter-of-fact as possible.*

* I want to take a minute to review our Introduction Process with you because it’s important you understand we are here to help those who are important to you.
* ***Next proceed with the Introduction Process you’ve created previously in the program.***

# MEETING WRAP-UP

# Do You Have Any Questions?

# *Answer any questions they may have and if you aren’t sure of the answer, let them know you will find it and tell them when you will have it to them. Remember to ‘under promise and over deliver’ and not ‘over promise and under deliver’ when setting time-frames.*

# Next Steps…

# *Provide a quick summary of the meeting and outline any next steps coming out of the discussion today. Tell them it was great seeing them and that you hope they enjoy the rest of their day!*