🗹 REALITY CHECK

Name: Click and type

Date: Click and type

Once you’ve completed this strategy, please submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check*.

Pre-Appointment Phase

1. When do we thank someone (existing client, co-worker, centre of influence, etc.) for introducing us to someone they know? Click and type
2. What is the purpose of the Pre-Appointment Phase? Click and type
3. How many steps are in the Pre-Appointment Phase? Click and type
4. What is the purpose of the Introduction Kit? Click and type
5. How will this process benefit the advisory team? Click and type