

What You Can Expect from this Best Practice

PURPOSE

- To ensure that you are consistent and congruent from one review meeting to the next
- To be sure everyone in the meeting knows exactly what is being done and in what order
- To appear thorough and professional at every review meeting

EXPECTED RESULTS

You will:

- Stay on track during review meetings
- Be certain to cover each point on the agenda
- Reinforce your Introduction Process with clients to create a stage of readiness
- Reinforce your approach
- Monitor and update their Personal Financial Organizer

Your clients will:

- Learn to expect and appreciate the process
- Have a reference for what was covered in the review meeting
- Have a better understanding of what was done
- Have an additional reference to use when telling their friends and family about you
- Understand exactly what you do for them by way of the Personal Financial Organizer

ACCOUNTABILITY

You will:

- Identify and commit to regular review meeting with your clients
- Ensure you meet with your high value clients (AAA) at minimum annually
- Be proactive: use your CRM to automate the prompting for review meetings

Your clients will:

- Tell you AND OTHERS how impressed they are with this process
- Feel under-whelmed if they ever meet with another advisor who does not provide them with a standard review meeting approach, including an agenda
- Appreciate the understanding the Personal Financial Organizer brings to them.
- Perceive you as different from other experiences where they felt they were dealing with a 'sales person'