🗹 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*.
    - Email it as an attachment to Sherri

Pre-Appointment Process

1. What is the purpose of the Pre-Appointment Process for high value clients? Click and type
2. How is this meeting positioned to your clients? Click and type
3. Which of your clients will be going through this process? Click and type
4. What are some of the items on your ‘refresh’ list going to be? Click all that apply:

Your Approach to Investment Management

Your Deliverables to Investment Management

Your Approach to Financial Planning

Your Deliverables for Financial Planning (PFO Binder)

Your Fee Structure

Your Team

Your Self (Qualifications & Credentials)

Other (specify) Click and type