



SYSTEM FOR ANNUAL REVIEW

1 Every Client, Every Year

Have a system in place for getting in front of every single client, at a minimum one time per year, for an annual review.

2 Consistent Language

Have consistent language down in order to set this up along with an effective response to a client who is not willing to do so.

3 System for Meeting Prep

Have a system in place that accommodates for total preparation of the meeting. This should include reviewing all case notes from all prior meetings, review of their most recent plan, comprehensive review of all products purchased, and an update on all referrals given in the past.

- In preparation for the meeting have: a filled-in financial planning checklist from the conclusion of the most recent meeting, a copy of their plan, an updated statement of all products owned with you, and an updated sheet highlighting current referrals you have received year to date.

4 Financial Planning Checklist

Use this tool to bring the vision for total long-term financial security to life, helping the light at the end of the tunnel burn brighter each year.

5 Meeting Agenda

- At the start of the meeting, have a way to create an executive summary of all conversations had, issues addressed, and actions taken.
- Begin the meeting by thoroughly updating the fact finder (Review both the facts and the goals.) Summarize the changes from the prior year and either congratulate them or understand the backwards movement.
- Bring out the financial planning checklist. Have a discussion around their current status along with their thoughts on moving closer to their vision.

6 Discovery Agreement

Utilize consistent language that effectively sums up the dialogue of the annual review, states the appropriate next steps, and clarifies the expectations of the next meeting. Set the next appointment.

7 Referrals

Review an updated status of all referrals given, thank them for the successful ones, and prospect for more.