The Thriving Model ™

A Better Way to Grow Your Practice and Exceed Client Expectations

Step 1

Fact Finding Meeting

Meeting at Financial Advisor's office: 1-1.5 hours

- Appointment is scheduled by Financial Advisor. Both husband and wife must be present if we are planning for both).
- Fact finding only - no solutions will be proposed.
- Client is asked to fill out Confidential Personal Information Form and to bring in copies of any existing estate planning documents.

Step 2

FA/Attorney Meeting

Financial Advisor and Attorney Meeting: .5-1 hour

- Attorney and Financial Advisor work together to design a solution set.
- Attorney develops estate planning proposal. Financial Advisor obtains insurance illustrations.

Step 3

Solutions Meeting

Meeting at Financial Advisor's office: 1-1.5 hours

- Attorney will present planning recommendations, including product sale.
- When client accepts proposal, Attorney will collect 50% of the legal fees and schedule signing appointment in two to four weeks. Financial Advisor prepares applications and forms needed for product sales.
- With client's consent, Financial Advisor will be included in signing meeting and family meeting with client's children and/or trustees. This allows Advisor to meet and begin establishing relationships with the next generation.

What is in it for you?

- **More Referrals** - Meet client's children and trustees at future meetings
- **New Assets Under Management** - Fact finding is key. To do a thorough job of estate planning, we have to know what they have and how it is titled. This often uncovers assets that can be transferred to you.
- **Product Sales** - Many of the solutions we propose will require additional products, such as: life insurance as an investment vehicle in a gifting trust; insurance to fund buy/sell agreements; long term care insurance; IRAs; single premium annuities in tandem with wealth replacement life insurance; term life insurance for younger head of household clients.

To find out more about how the Thriving Model ™ can help you grow your practice and amaze your clients, call Jackson Michael Doggette Jr. at (866) 639-3856.

Doggette LAW FIRM, P.L.

Preserving Treasures and Legacies

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