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 Estate Planning Information" booklet* 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 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 for single or joint lives, as an estate tax solution owned by an ILIT, as a business succession tool or as wealth replacement, for health, disability, long term care, to fund buy/sell agreements, property and casualty, CGL, business intervention; or various tax deferred retirement plans, the DB of which may or may not be a trust.

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