ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Live Advice Session

August 16, 2022

With Host Mark McKenna Little

The Comprehensive Safety Review™

August 16, 2022

ADVISOR PACT

The Advisor PACT™ Monthly Program

Summary

- ✓ **Resolve: Deliver Truly Comprehensive Financial Services™ at the highest level**
- ✓ **Execute: Fill Administrative Manager + 5 Subject Matter Expert vacancies within 30 days**
- ✓ **Leadership: Hold everyone accountable to your standards.**

August 16, 2022

Question

- ✓ I have The Comprehensive Safety Review™ coming up for one of my Ideal Clients, could you take it slow and walk me through that meeting?

Name	Date modified	Type	Size
00_CSR_The Purpose of The CSR OUTL...	7/28/2022 9:06 PM	Adobe Acrobat D...	245 KB
01_CSR_Script_Binder_201909251611	8/9/2022 10:11 AM	Adobe Acrobat D...	1,024 KB
02_CSR_Initial_Client_Prep_Packet_201...	8/9/2022 10:12 AM	Adobe Acrobat D...	2,996 KB
03_CSR_Corrected_Client_Prep_Packet...	8/9/2022 10:11 AM	Adobe Acrobat D...	3,177 KB

Client Progress Meeting 60-minute Timeline

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- ***Closing Routine (3 min)***
- ***Transition now to The Referral Conversation***

Ideal Client (Lynn & Ted)	Trusted Advisor	Action
	Lynn. Ted. I'm glad we were able to get together today for your progress meeting. We call this meeting The Comprehensive Safety Review™ and our goal today is to increase the safety of your comprehensive lifetime written financial strategy. As we do at this meeting every year, we make certain that there is a sensible strategy in place for every risk to your plan so that you leave this meeting on track to actualizing your Financial Road Map®. As always, we're recording this meeting for the members of your Deliverables Team who aren't here. As with every one of your progress meetings, we'll measure the progress you've made against the goals you've established for yourself. We'll review every action item our team recommends for you to be on track for your goals. The objective after today's meeting is for you to walk out the door with an overwhelming sense of confidence that you're making progress; okay?	
Great. I love getting these progress updates.	It's important that we meet at least three times per year and, as always, we commit to making this a worthwhile investment of your time. We have important topics on the agenda today, but before we get started, what issues did you bring to this meeting that you want to make sure we address today?	

Ideal Client (Lynn & Ted)	Trusted Advisor	Action
	Lynn. Ted. I'm glad we were able to get together today for your progress meeting. We call this meeting The Comprehensive Safety Review™ and our goal today is to increase the safety of your comprehensive lifetime written financial strategy. As we do at this meeting every year, we make certain that there is a sensible strategy in place for every risk to your plan so that you leave this meeting on track to actualizing your Financial Road Map®. As always, we're recording this meeting for the members of your Deliverables Team who aren't here. As with every one of your progress meetings, we'll measure the progress you've made against the goals you've established for yourself. We'll review every action item our team recommends for you to be on track for your goals. The objective after today's meeting is for you to walk out the door with an overwhelming sense of confidence that you're making progress; okay?	
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Ideal Client (Lynn & Ted)	Trusted Advisor	Action
I don't have anything additional to discuss.	Great, let's get started. The three of us will be present for today's meeting. However, I do have Fin, your Financial Planning Subject Matter Expert, on standby to respond to any detailed questions as we go through today's agenda, and, as always, Lorri, our Administrative Manager, is just outside if we need anything.	
Okay. Good.	*[TRANSITION: Motion towards the updated Financial Road Map®, already open in front of Lynn & Ted]* What you're looking at here is your Financial Road Map®. It's your accomplishment of these goals, which represent the best evidence that you've made smart choices about your money so that you're able to experience those things that matter most to you in life. *[Upward motion from their listed goals towards The Values Staircase™]* We've updated the "All The Money" Section of your Financial Road Map®: Your current debt balance is $1,599,870. Your current cash reserves balance is $388,630. And the term "growth assets" is what we call the amount you have currently accumulated which is earmarked for someday funding the financial goals you have set for yourselves; that number is currently $28,589,050.	**Financial Road Map®** **P. 2**

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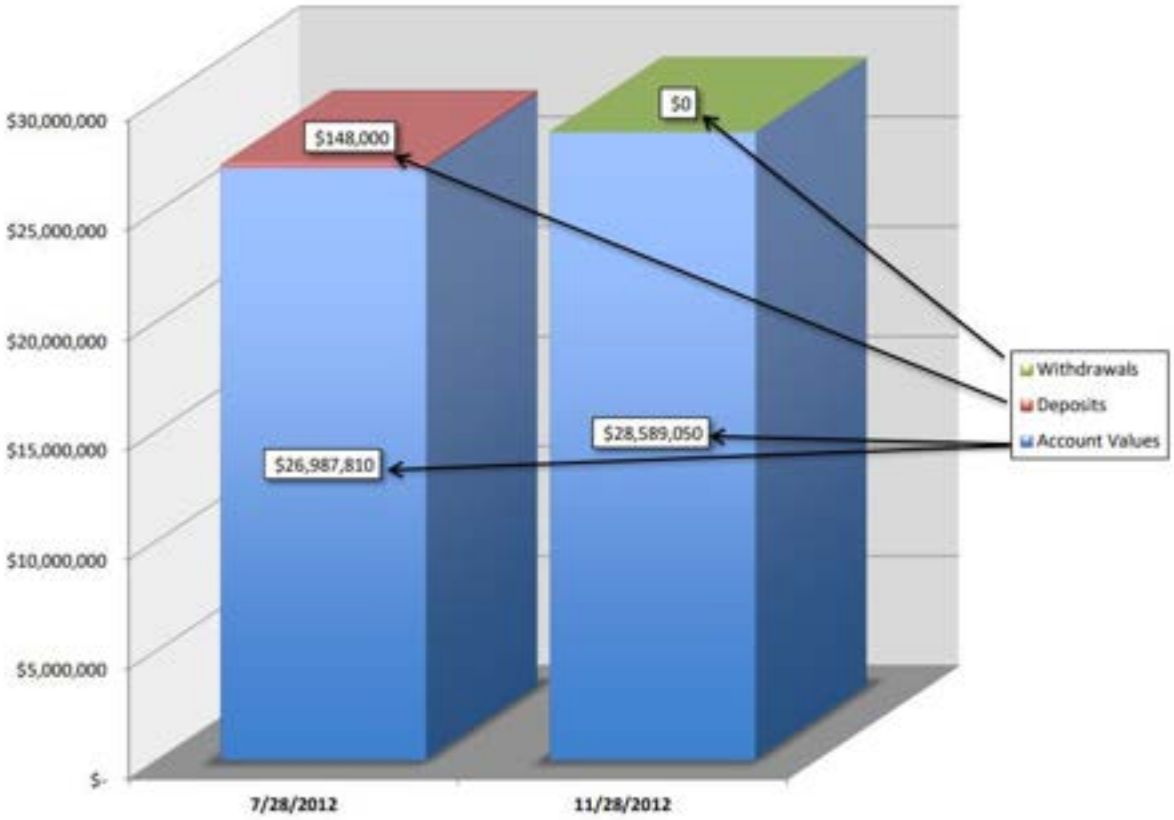
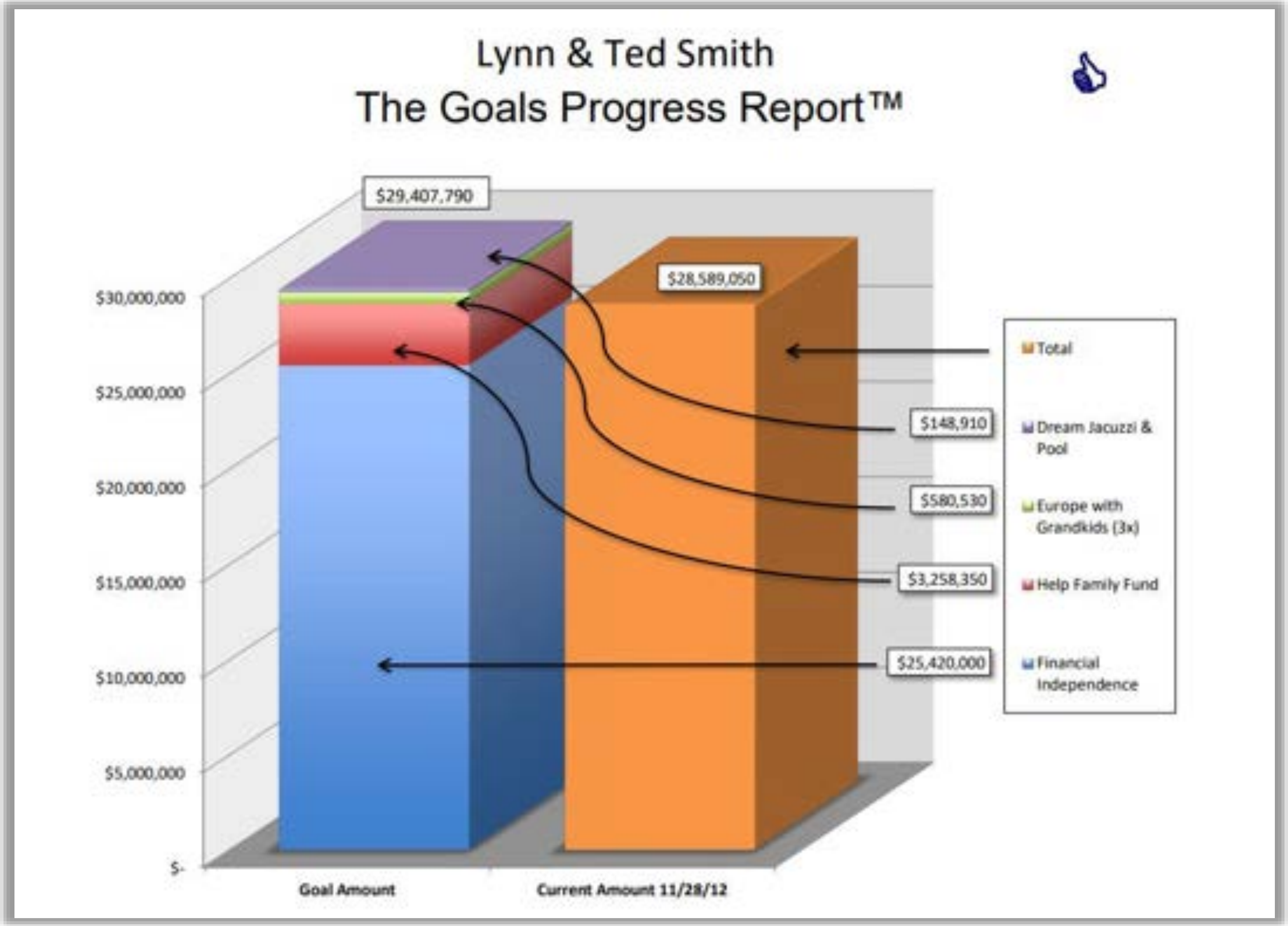
Give FRM to your client when they leave

Update these 3 numbers

Lynn & Ted Smith

The Growth Progress Since Last Meeting Report™




Lynn & Ted Smith
The Goals Progress Report™
$29,407,790
$28,589,050
$30,000,000
$25,000,000
$20,000,000
$15,000,000
$10,000,000
$5,000,000
$-
Total
$148,910
Dream Jacuzzi & Pool
$580,530
Europe with Grandkids (3x)
$3,258,350
Help Family Fund
$25,420,000
Financial Independence
Goal Amount
Current Amount 11/28/12

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The Comprehensive Safety Review Exercise™

Goal	End Result
1 Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life	2

Today's Date	Date of [illegible] Goal
3	4

What are the risks and obstacles which stand between you and your goals?	Strategy
5	6

Wait on 6 until they cannot think of ANY other risks in 5

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The Greatest Probability Strategy™ (GPS)

For Lynn & Ted Smith's November 28, 2012 Comprehensive Safety Review™

Action Items for the year 2012

NOTE: The action items in this sample bear letters simply for training purposes, and should NOT be included on your final version

ACTION ITEMS DUE BY DECEMBER 31st:

G. Lynn & Ted – Please review the Income and Expense Projection sheet we have provided, which you filled out on November 10th, 2011. Supply the "actual" amounts spent during this previous 12-month period shown. (7V5)

H. Lynn & Ted – Regarding future streams of income to fund your goals:

- **Ted - Schedule a phone appointment with** *[TA's Name]* **to conference-in the Amgen Human Resources department to request a physical projection based on your December 31, 2014 retirement date. Send the projection to** *[TA's Name].* **(3S2)**
- **Lynn – Your comprehensive written lifetime financial strategy includes $10,000 per month pension at age 60 from your time working for Wang Computers. Schedule a phone appointment with** *[TA's Name]* **to conference-in the Getronics Human Resources department (acquired Wang in 1999) to request a physical confirmation and projection for this benefit. (3S2)**
- **Ted - Last year you received a distribution from your mother's trust account. Do you anticipate receiving future distributions, and if so, how much do you think they will be? (3S2)**

C. Ted – Based on our conversation in the last meeting regarding your desire to fund all of your goals and provide Lynn the lifestyle she is currently living, please sign the pre-filled life insurance application from Benefits Life Insurance Company for a $18.6MM, 20-yr level term policy, and *[TA's Name]* **will submit for underwriting. (6U5)**

D. Lynn & Ted – Because your employers do not provide any disability coverage, please sign the pre-filled insurance application included in the meeting packet and return to Mark for submission to Disabilities-R-Us. Payment for these policies should come from your checking account x9432. (6Y9)

B. Ted – Based on our conversation in the last meeting regarding your involvement in the Chamber of Commerce, you have a level of liability that should be covered by a separate liability coverage policy. Please sign the pre-filled insurance application included in the meeting packet and return to *[TA's Name]* **for submission. (9G6)**

A. Lynn – After our discussion in the last meeting about long-term care protection, the Team recommends that you call Providential Insurance, at 888-555-1234, to apply for a long term care insurance policy with the following parameter: $275 Daily Benefit; 90 day Elimination Period; 6% Inflation Protection; Home Care Option. (4B4)

The Greatest Probability Strategy™ (GPS) Has 3 sections…

1. Action Items due before the next meeting date
2. Action Items due after the next meeting date, but BEFORE the end of the calendar year
3. Every Action Item due after this calendar year. Noted year-by-year.

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Get the advice you're paying for in The Advisor P.A.C.T. Monthly Program™.

"Contact Us" with ***every*** issue you're struggling with