



The Advisor PACT Monthly Session™

March 17, 2015
Hosted by Mark Little



Question

What does the first 90-days of a new client relationship look like?

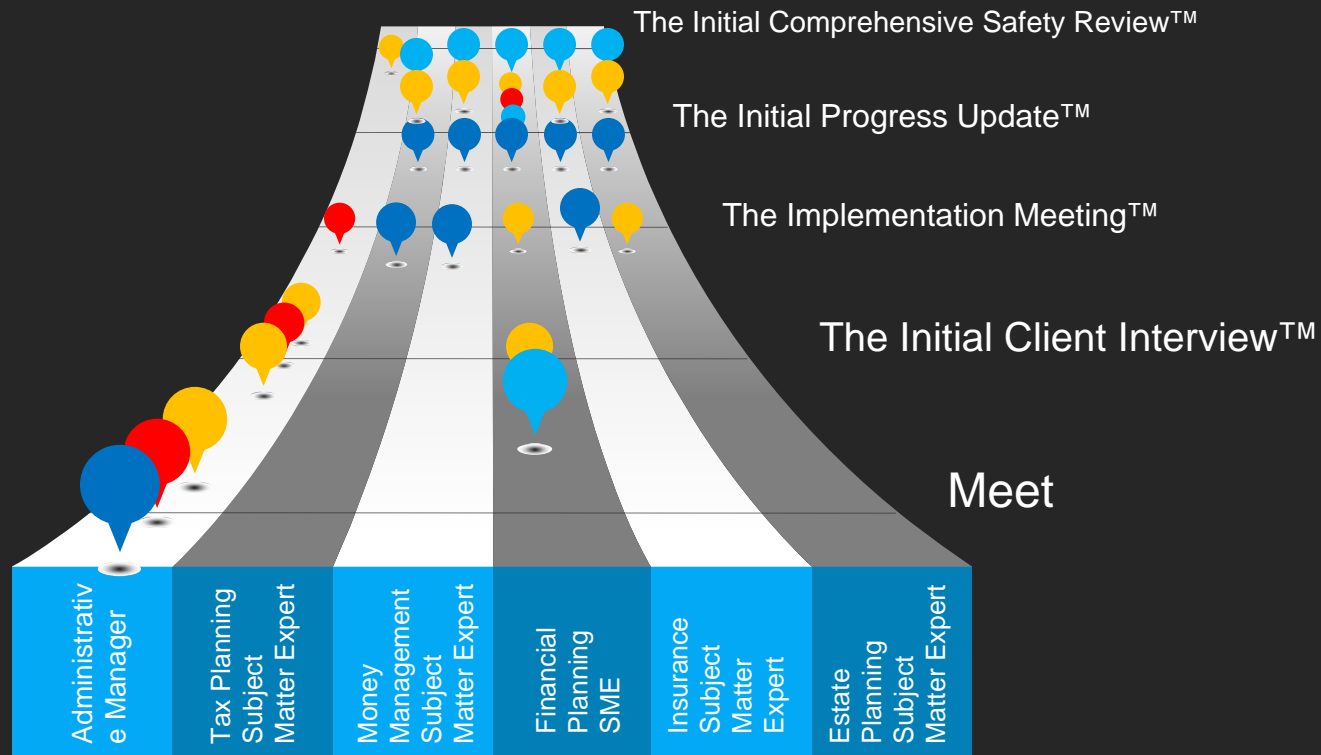
How do we on-board a new client into Comprehensive Financial Services?

March 17, 2015

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The Three Meeting Process™: First 104 Days





The Ten Client Deliverables™

1. **Over-arching Strategy:** Comprehensive written lifetime financial strategy
2. **The Greatest Probability Strategy™** (GPS) step-by-step implementation plan-of-action; every 4-months
3. **The Progress Reports™:** Benchmarking progress against client goals (and nothing else) updated at least once every 4-months
4. **Asset, Investment, and Money Management**
5. **The Annual Tax Projection**
6. **On-time Tax Filing (Lodging)**
7. **Estate Planning:** The Legacy Flow™
8. **The Goal Blueprint™:** a 1-pager, updated at least annually, describing both the strategies & tactics for each goal (goal status updated every 4-months)
9. **Cash Reserves and Debt Management**
10. **The Comprehensive Safety Review Exercise™:** The Insurance Grid™

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The first 104 days

14 days
+ 45 days
+ 45 days

= 104 days

The Three Meeting Process™



The Initial Client Interview™ *Client Meeting #1* Best Result:

Establish where you are now, and the specific goals you want to accomplish in order for you to experience those things that matter most to you.

Target: 14 Days

The Implementation Meeting™ (IM) *Take Action On Your Plan* Best Result:

- Begin implementing your comprehensive lifetime written financial plan
- Review your lifetime GPS Action-Plan for every year of your life for which our team has a recommendation

Target: 45 Days

The Initial Progress Update Meeting™ (IPU) *Follow-up on Actions Taken* - Best Result:

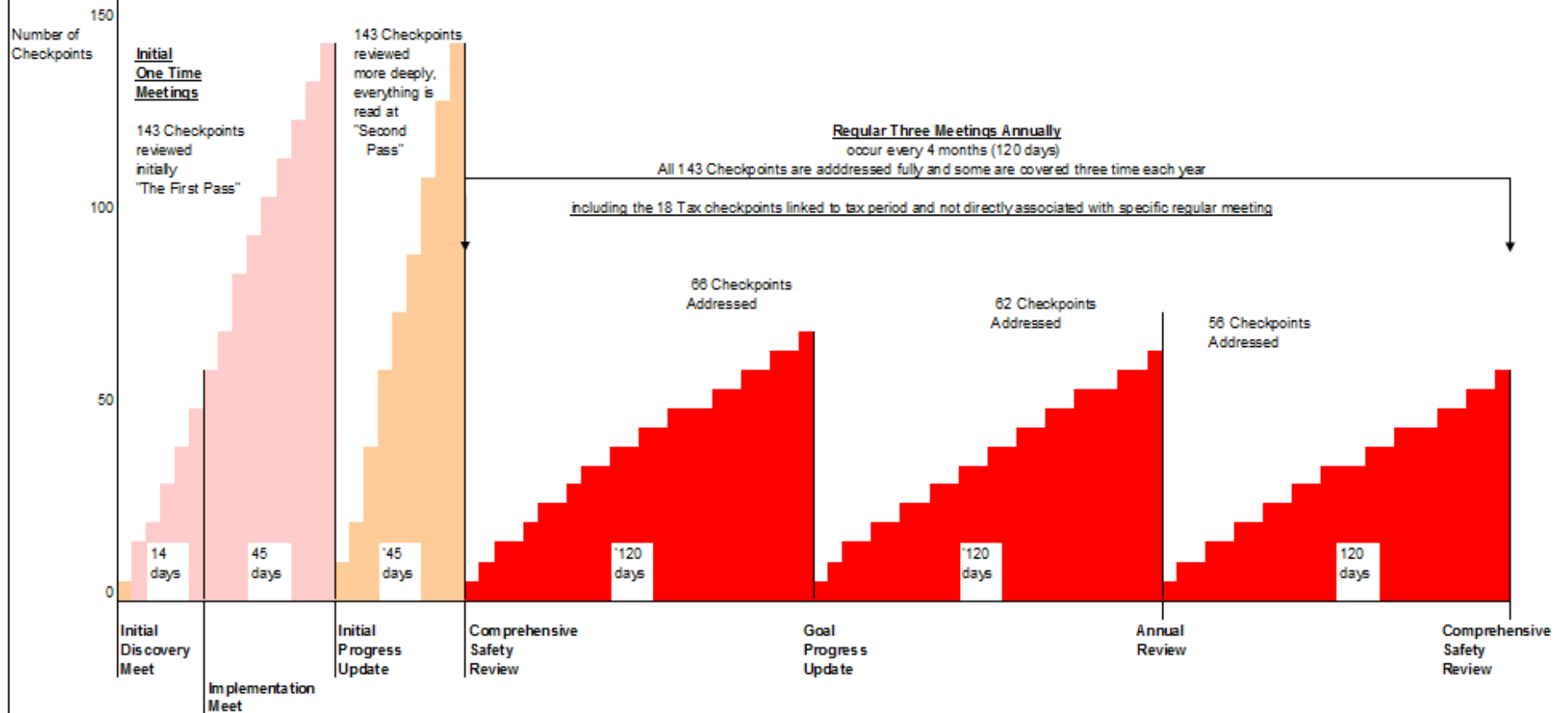
Measure progress since The Implementation Meeting on your actions taken

Target: 45 Days

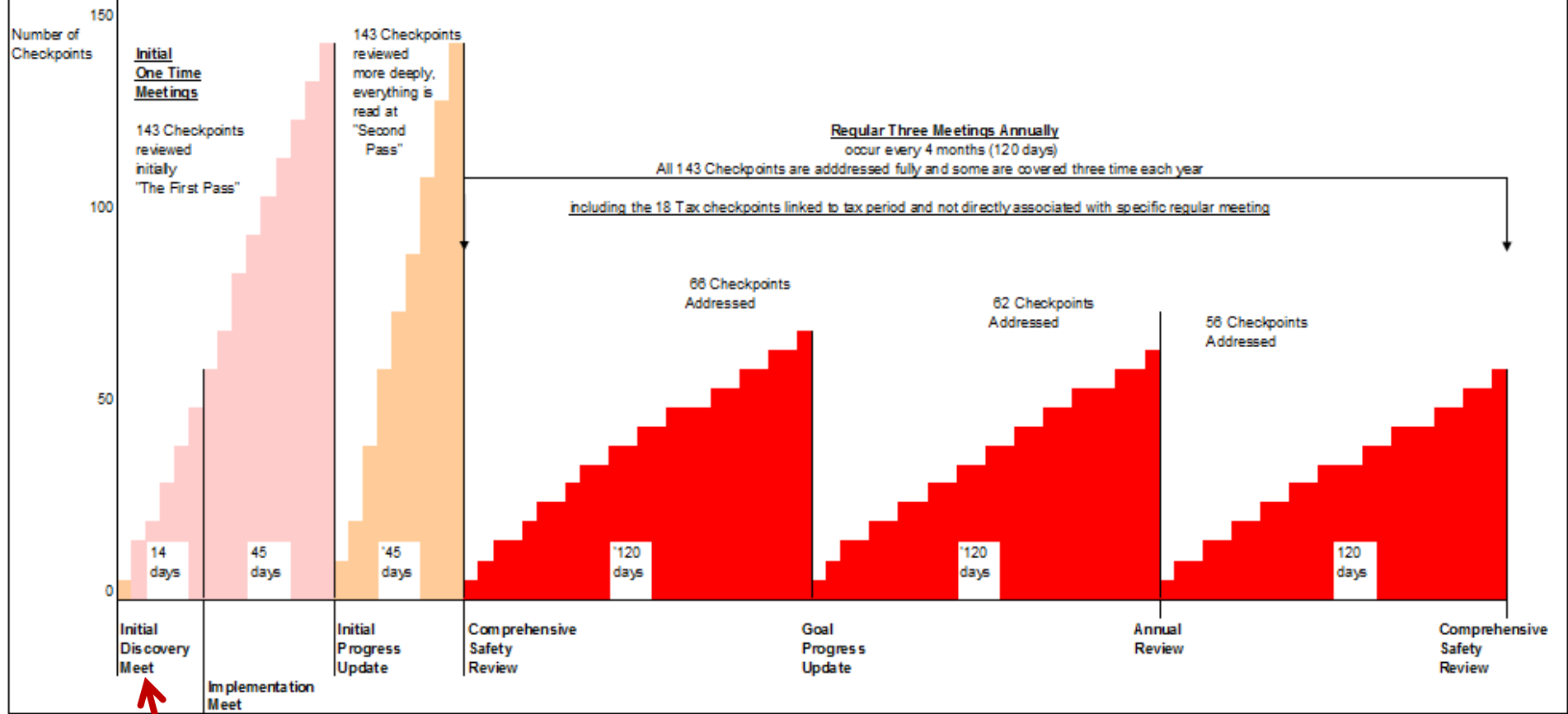
The Comprehensive Safety Review™ (CSR) *Address Every Risk to Your Plan* Best Result:

- Recommendations from full insurance review
 - Review of Key Progress Reports
 - Review your GPS Action-Plan

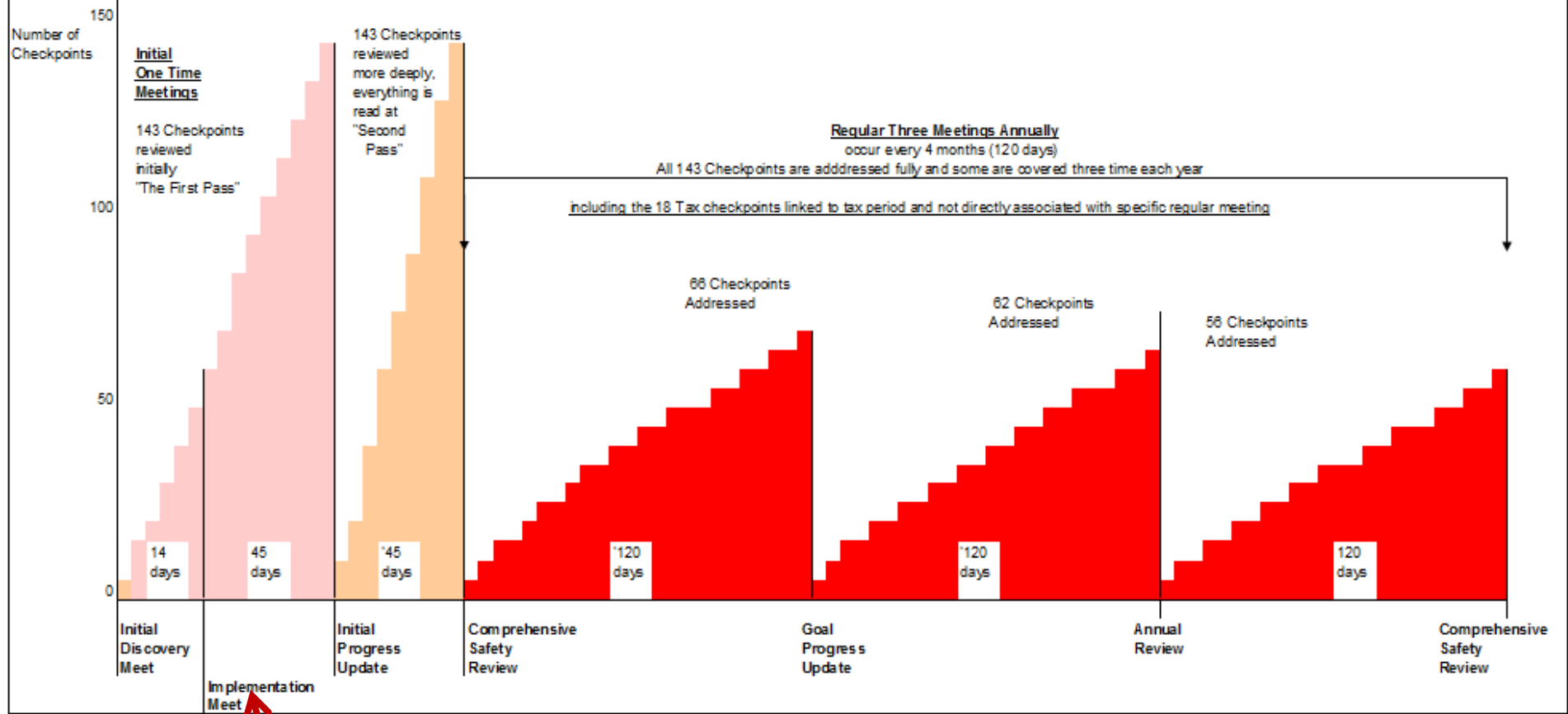
Timeline for Deliverable Checkpoints Addressed in First year

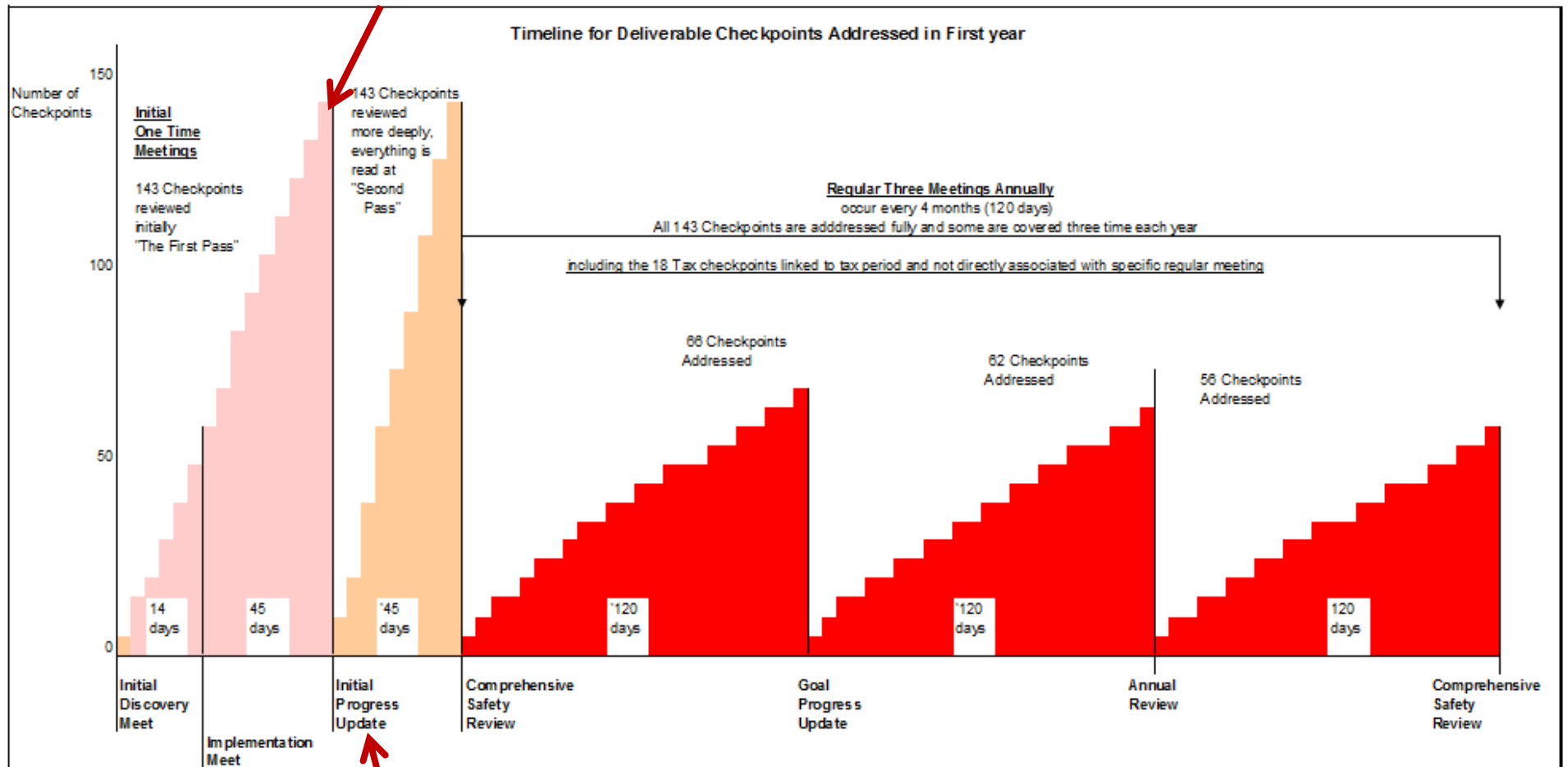


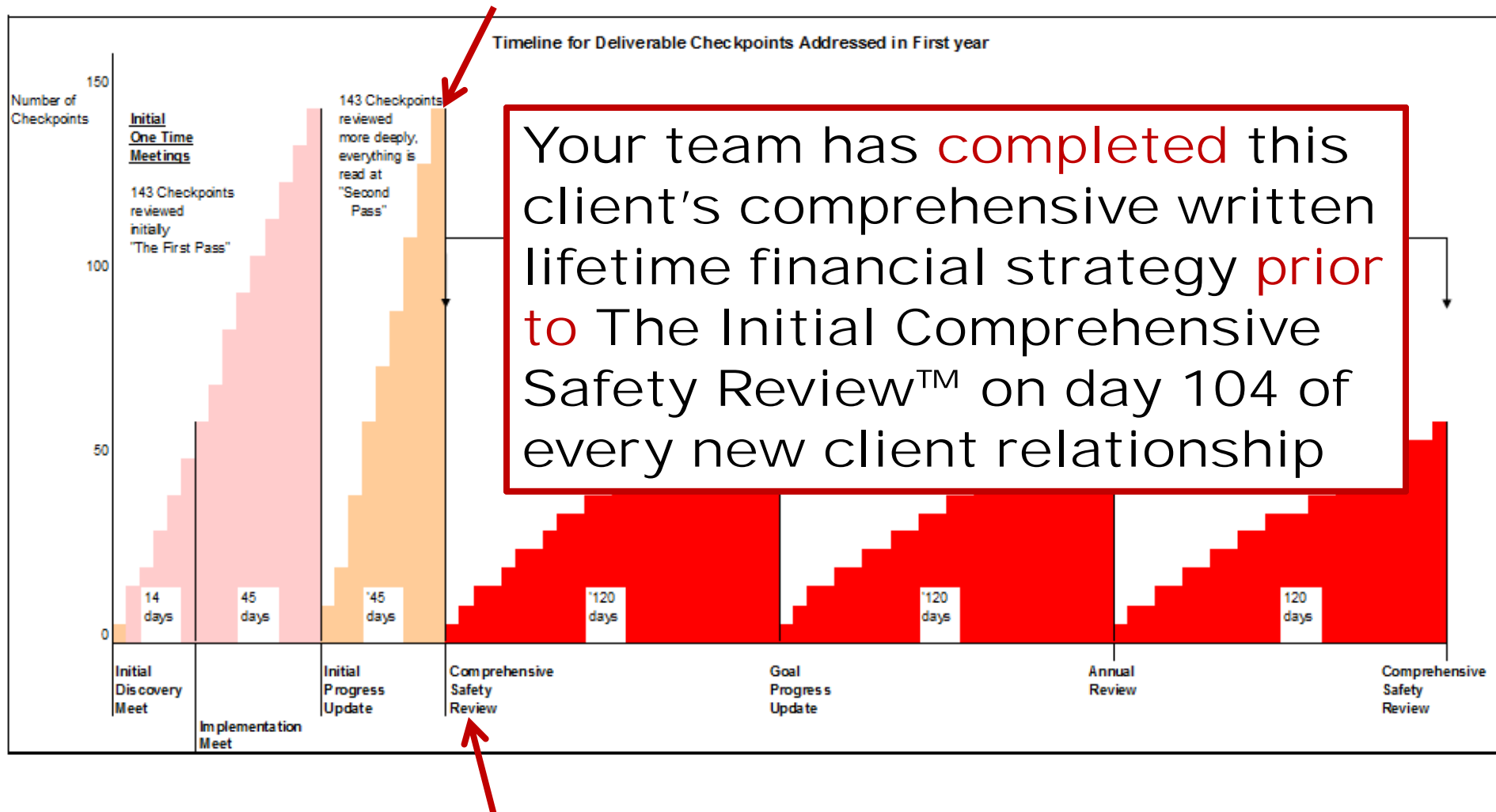
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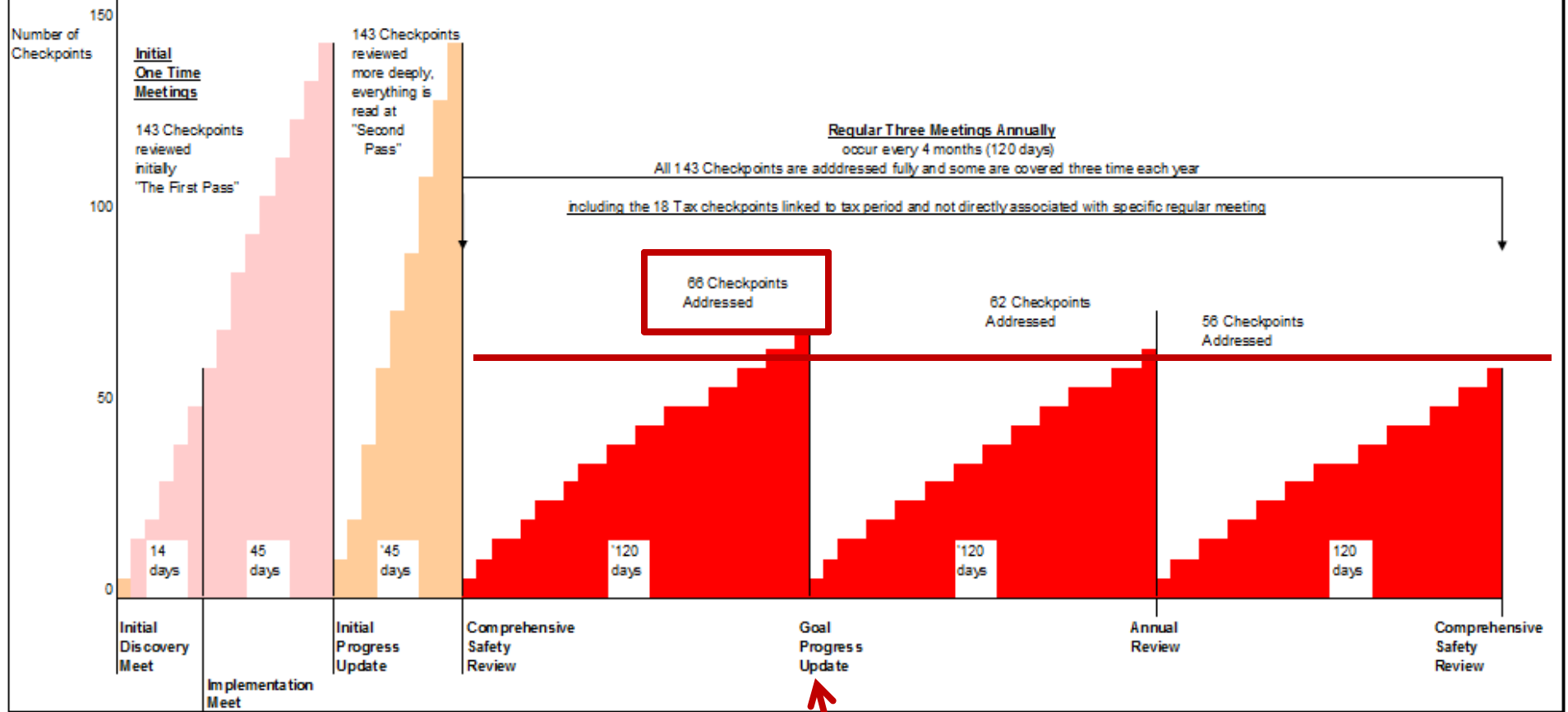
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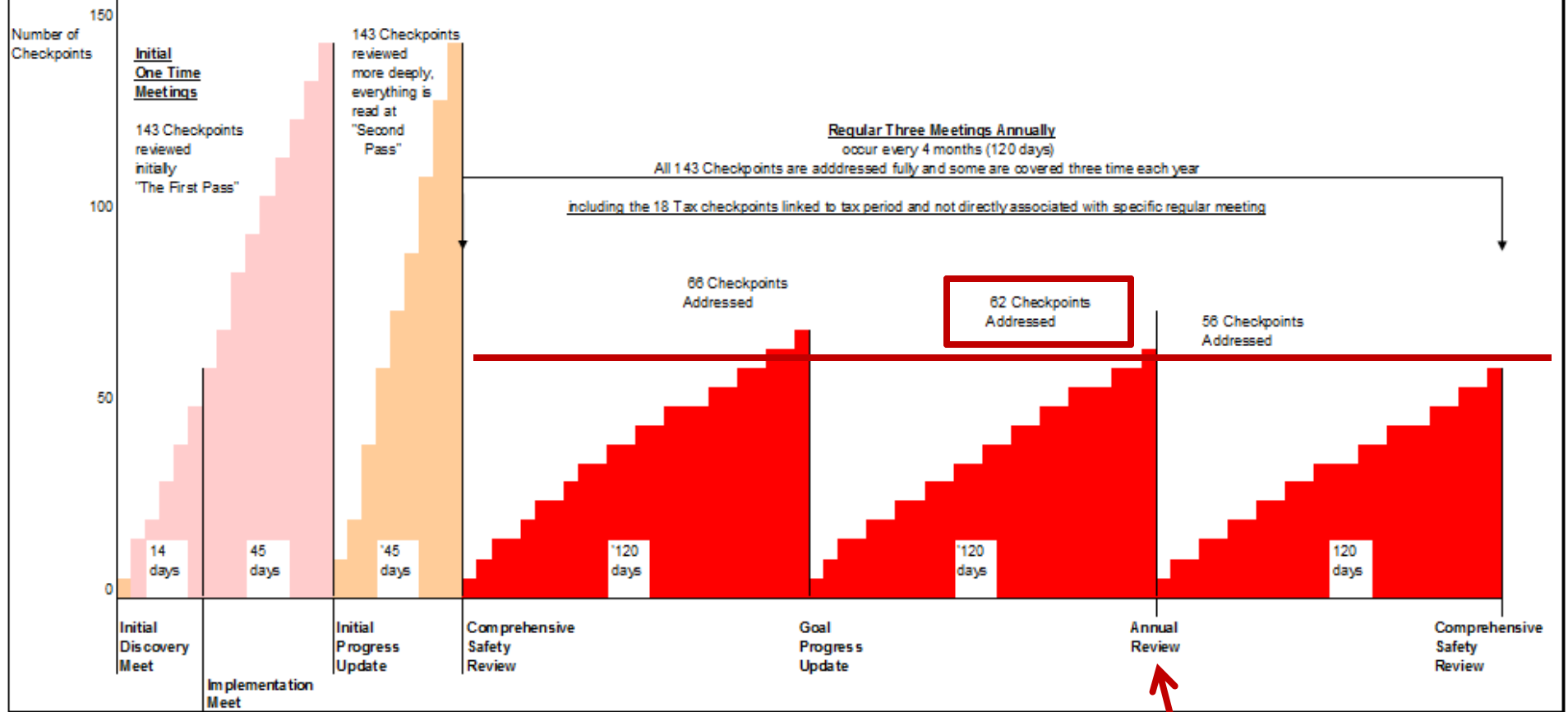




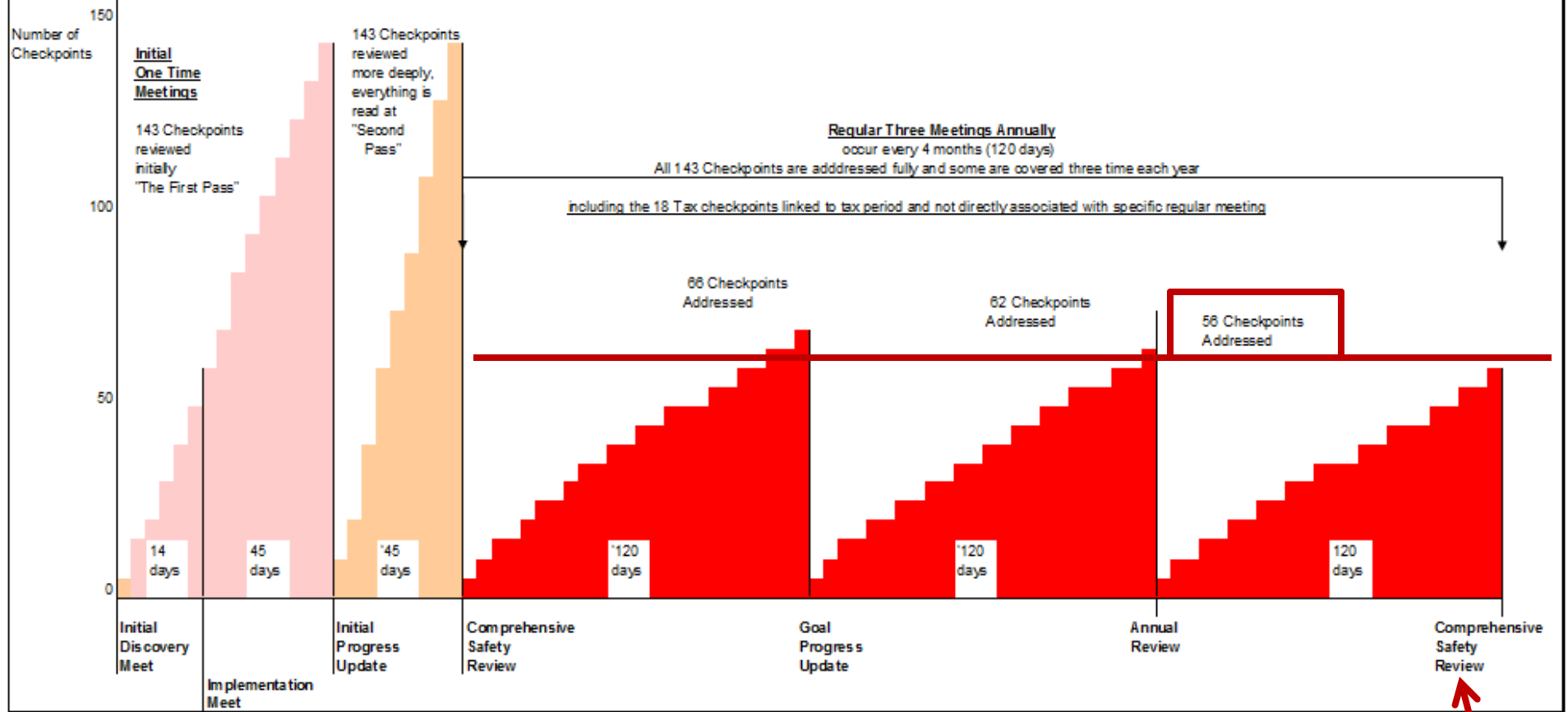
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The Three Meeting Process™: First 104 Days



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	Meet	ICI	TIM	IPU	ICSR
		Administrative Manager	Subject Matter Experts	Trusted Advisor	
Past follow ups		Oversight			Responsible
Meeting Assignments		Make Assignments	Responsible		
Deliverables Checkpoints™		Make Assignments	Responsible		
Meeting reports		Make Assignments	Responsible		
Review all work			Responsible		Responsible
Dry-Run Prep Meeting™		Facilitate	Contribute		Attend (observe)
Client progress meeting					Conduct

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