WBC Professional Virtual Personal Introduction Process Via Webinar

Approach: *Ask your current client for help with identifying other people they may know that might be interested in looking at this retirement income planning process versus just having a savings/investment plan.*

Advisor: "After seeing how this process works and the value it provides would you be willing to help me identify some other people you may know that might find value in seeing this? I have a very professional way of doing this that is easy to do and is done in a way that is very careful not to embarrass you or me with the people you know. It generally takes about 15-20 minutes and we can do it over a webinar."

Client: "Yes, Ok."

Advisor: "Ok, let's set up a time to walk through this process via webinar and go from there, sound good?"

Making Initial List (have a word document up that mimics the below):

Client Attributes:

Ages:

Income level:

Geographic location:

Good/Nice People

Other qualities you want to list

Where From?

Friends, Work, Family, Religious Activities, Sports, Hobbies, Clubs, Etc…

People:

Write down the people they come up with without prequalifying and then circle back and ask them "of the people on this list which ones do you feel comfortable with sending a quick note out to suggesting they meet with me for an introduction meeting regarding the retirement income planning process I use?", then simply cross off the people that don't apply.

Joe Smith

Kathy Sample

~~Marky Mark~~

Etc.

Ask Client to Send Email:

Ask client to send a quick email out copying you on it with the language below to the people you've identified with them. Then you will follow up with that person on it.. the key is that the client knows you wont' embarrass them or bug the person they are introducing to you, so just tell them you won't and behave appropriately. Ask them if they want to do that right now and they can transcribe the language you have below into their email to send out as you are on the webinar with them, or you could email them the language to copy/paste. You could even have them show their screen to send out the emails right then and there.

Client Email Template To Send to Identified People:

"I'd like to introduce you to "XXX".. we've been working with him/her for some time on our retirement income planning versus just having a savings/investment plan and have really liked his/her process for this. It is very different than most of what you see out there in the financial planning world and just makes a lot of sense. I'd recommend you meet with XXX for an introduction to see if you'd be interested… If you're not interested that's ok too, and XXX definitely won't bug you if that's the case. I've copied XXX on this email and will let you guys take it from here. Feel free to contact me if you'd like to discuss."

Email Follow Up to the person you are being introduced to:

"Hi "XXX", just saw the email from "XXX" introducing us. Nice to meet you. As "XXX" mentioned we have a very good process for retirement income planning that he/she thought you might be interested in seeing. What we've found is many people have some sort of savings/investment plan, like a 401k or something similar, but that many people haven't put together a real retirement income plan that measures their retirement income in the future and helps them define "How much to save?" and "Where to put it?" to reach their retirement income goal at their desired retirement age. That type of retirement income planning is exactly what I do.

Would you be interested in talking more about this with me? Please let me know either way if you are interested or not, as I certainly don't want to be a bother to you.

Thank you, XXX

PS. Below is a short video titled "Retirement Savings Dilemma Video" that will also give you more of an idea of the type of retirement income planning I do."