Pre-Retiree Client Process

PERSONAL INTRODUCTIONS

(60 Minute Meeting)

1. Process Review with Client
2. Identify Personal Introductions
3. Complete Handwritten Introductions

(Forms/Supporting Docs to Use: Process Review, A Personal Introduction – Pre-Retiree)

INTRODUCTORY MEETING

(20-30 Minute Meeting)

1. Your Perspective (Optional)
2. Pre-Retiree Introduction Presentation
3. Rough Populate the Pre-Retiree Blueprint
4. Set Next Appointment

(Forms/Supporting Docs to Use: Pre-Retiree Cornerstones Blueprint™)

PROTECTION

(60 Minute Meeting)

1. Pre-Retiree Protection Presentation
2. Applications for Life/DI Insurance
3. Set Next Appointment

(Forms/Supporting Docs to Use: Family Income Protection Calculator)

WEALTH BUILDING

(3 Meetings – 60 minutes each)

Meeting #1

1. Pre-Retiree Wealth Building Presentation
2. Present an Example Cornerstones Calculator™ Output Summary Page
3. Applications for Life Insurance
4. Set Next Appointment

Meeting #2

1. Review Pre-Retiree Wealth Building Presentation
2. Present/Run Personalized Cornerstones Calculator™ Outputs
3. Refine Calculations as Necessary
4. Set Next Appointment

Meeting #3

1. Review Cornerstones Calculator™ Outputs as Necessary
2. Implementation of Desired Products
3. Set Next Appointment

(Forms/Supporting Docs to Use: Cornerstones Calculator™, Pre-Retiree Cornerstones Blueprint™, Personalized Savings Allocation Worksheet, Regular Calculators, Historical Market Returns and SPIA Rates, Withdrawal Rate Simulation Info, Etc.)

Wealth Building Cornerstones™