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 - Retiree)

INTRODUCTORY MEETING

(20-30 Minute Meeting)

1. Retiree Introduction Presentation
2. Complete Retirement Objectives Worksheet
3. Rough Populate a Fact Finder/Retiree Blueprint
4. Set Next Appointment

(Forms/Supporting Docs to Use: Fact Finder, Specific Retirement Objectives Worksheet, Retiree Cornerstones Blueprint™)

PROTECTION

(60 Minute Meeting)

1. Review Property and Liability, Health and Wellness, and Final Affairs Protection
2. Applications for Health and Wellness Protection as Necessary
3. Set Next Appointment

INCOME/LIQUIDITY/LEGACY

(3 Meetings – 60 minutes each)

Meeting #1

1. Review Functions of Money in Retirement and Specific Retirement Objectives
2. Discuss Income/Liquidity/Legacy Tool Options and How They Work
3. Review Sample Income/Liquidity/Legacy Output Summary Page
4. Applications for Life Insurance as Necessary
5. Set Next Appointment

Meeting #2

1. Review Income/Liquidity/Legacy Tools
2. Present the Income/Liquidity/Legacy Comparison Options from the Retiree Cornerstones Blueprint™
3. Refine Income/Liquidity/Legacy Options as Necessary
4. Set Next Appointment

Meeting #3

1. Implementation of desired Income/Liquidity/Legacy Option
2. Set Next Appointment

(Forms/Supporting Docs to Use: Retiree Cornerstones Blueprint™, Retirement Income Tool Option Worksheet, Withdrawal Rate Simulation Info, Etc.)

Wealth Building Cornerstones