

Bridge Talk™ Sample Scripts and Language

What do you do?	What is that?	Tell me more about that!
We have a firm in [city] that helps families retire on their terms.	Our experience has been that most people don't know what they want their retirement to look like, and we help them with that.	It really begins by clarifying what they envision retirement looks like and how they plan to spend their time. Most of the people we meet with have given some high level thought around this, but haven't concretely defined it. Unfortunately, most financial advisors don't spend sufficient time on this and end up designing a plan that is often misaligned with what their client really wants. We ensure that doesn't happen.
We have a company that helps business owners keep what they've built.	Most business owners put everything they have into building their company and usually face a bit of risk along the way. We help them make sure that they get the payoffs they should from all that risk.	We developed a system that helps our clients get laser clear on the goals they have for the proceeds of their business, how they want to use the wealth they create and how they want to protect it. Then we help them put a plan in place to keep it.
We help family business owners make the most of everything they've got.	Family is at the epicenter for why most family businesses exist today. Oftentimes they were built by the hard work and vision of one generation, but then the purpose almost always shifts to how they can create opportunity for future generations while building a lasting Legacy. We ensure that happens.	It might sound complicated but it's actually a pretty simple concept and that is why our clients appreciate it so much. It begins with Discovery, where we are focused initially on understanding the history behind the business. Once that is captured, we focus on establishing clarity for their vision and goals for the future. As you can imagine, this creates a powerful foundation from where we can successfully plan.
I help high-net-worth families solve their very unique problems.	At a certain level of wealth, things become more complicated. Families at that point need something that goes beyond the work of traditional advisors. We have a very specific approach to help families make important decisions about their wealth.	For most people there's a gap between the planning they've done and what they might envision to be their ideal plan. It's basic human nature. Every time we arrive at a destination, we pick a new destination. Think about all of the planning you have in place right now – the decisions, structures or goals. Now think about these in the context of an <i>ideal plan</i> ; one that gives you the greatest amount of satisfaction and confidence. Are there any gaps that come to mind?
I help families think like a CFO would.	Most of our clients over the years have done lots of planning and have lots of advisors, but still feel like things aren't quite "handled." We bring the management and oversight for the things that are most important to them. Our clients think of us as their family CFO.	We have a method that our clients really appreciate. It starts with Discovery, where we focus on clarity for their vision and goals for the future. It ends with management, where we set the plan to ensure that what they put it place is monitored and communicated consistently across all parties.
We help affluent families achieve clarity at the intersection of life and wealth	My guess is that there are some substantial values and life philosophies that have contributed to your success as a wealth builder. Is that fair to say? Ironically, the primary focus of traditional planning is the preservation of financial assets. My firm works to simultaneously stimulate the preservation of the <i>intellectual</i> capital that's deeply engrained in most successful families.	Clarity²: Many families have a team of top notch advisors yet the advisors aren't working in a synchronized manner. The family can't seem to capitalize on their collective wisdom. This stems from a lack of clarity – on the part of the family and the advisors – as to exactly what the family is trying to accomplish. Clarity ² is the exponential result that's achieved when your vision for your wealth is extremely clear and your entire team of advisors is working in concert to achieve it.