LEGACY

4 Decision System™ Workflow

Decision 1

Explain who you help and what problems you solve

Prospect agrees to meet with you

Tool to use: **Bridge Talk™**

Decision 2

P.A.R.E.

- Present Talk
- Appreciate & Bridge Talk™
- Right Fit
- Efficient Meeting Plan
  - » Draw out the Planning Horizon®
  - » Light Fact Find
- If they have an immediate need, proceed to **A**
- If they don't have an immediate need:
  - » Draw out Wealth Optimization System® (WOS)
  - » Explain Engagement Agreement
  - » Discuss Fee Amount

Prospect agrees to engage

Tool to use: **Approach Talk**

Do they have an immediate need?

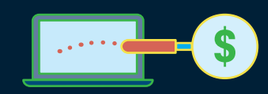
YES → **A**

NO →

Collect Fee & have them sign any Disclosures
Then Discuss Next Steps

↓

Internal — Post-Approach Talk



Email pre-meeting financial factfinder to client

A Decision 3

Tactical Engagement

- Explain the Solution
- Implement the Solution
- When that is addressed, re-engage for a planning engagement
  - » Draw out Wealth Optimization System®
  - » Explain Engagement Agreement
  - » Discuss Fee Amount
  - » **If they agree to engage in a planning engagement:**

B Decision 3

Planning Engagement

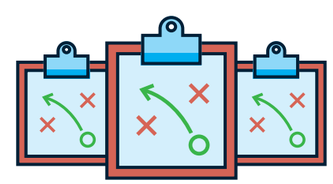
- Review Planning Horizon® and WOS with client
- Document Fact Finding in Discovery Insight Workbook™: Values, Vision, GISOR

Internal – Post-Discovery

- Input Goal Information into Qualitate™ app
- Create Discovery Letter & Affirmation Report to send to client
- Follow-up to obtain any outstanding financial information
- Enter financials into your financial software

Client commits to goals

Internal — Prepare for Recommendations Meeting



- Create the plan
- Print recommendations report from Qualitate™
- Print financial output from your financial planning tool

Decision 4

- Deliver the plan
- Present Recommendations using Goal Achievement Report and financial output

Client commits to implement

Year 2 — repeat from **B** for re-discovery

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