

Common Moments of Truth

Core 4

Joyous & Fun Moments to Acknowledge

- Getting Married
- Wedding Anniversary (milestone)
- Birthday (milestone)
- Birth of child (grandchild)
- Adoption of a child (grandchild)
- Child grown up and goes off to University (grandchild)
- Child grown up and moving on and out (grandchild)
- Academic, Art & Music or Sport accomplishments of child or grandchild
- Empty nester
- New pet welcomed into the family
- Promotion at work or other work accomplishment or change in career
- Graduation (Degree, Designation, Exam, Course, etc.)
- Retirement
- Purchase 1st Home or New Home
- Own Home (Mortgage Free)
- Purchase Vacation Home
- Purchase Recreational Vehicle (Sports Car, Sailboat, Motorcycle, RV, etc.)
- Purchase or Sell Business Assets
- Go on Significant Vacation
- Client well again after being sick or surgery
- Other personal or professional accomplishments
- Client Account Anniversary or Account Milestone (i.e. The Million Dollar Club)

Other Important Moments to Acknowledge

- Client, spouse, child, parents or other loved one spending time in hospital [illness, disease]
- Death of spouse, child, parent or other loved one (including family pet)
- Divorce or other serious family issues
- Loss of Employment
- Other personal obstacles or tragedies that impact the life of your client