Review Meeting Key Message Scripting

Look at the agenda for your meeting, and point to the item on the agenda when you begin speaking about the Review of Our Practice and Approach.

This scripting should take about 45-60 seconds.

* [Client], I'm just going to take a minute to review our approach with you.
* This is important because there are different kinds of financial professionals out there, and some simply do the investment piece, while others specialize in just estate planning – so we want to make sure we remind you from time to time about what our approach to wealth management is all about.
* We believe in and practice Comprehensive Wealth Management because we know it’s the best way for us to help you*.*
* We take great pride in helping our clients with all aspects of their financial and wealth needs, including the investment piece of course, but also estate planning, insurance, and tax planning - really everything that is required so that you can sleep well at night knowing that everything is looked after.
* Everything we discuss and implement is to help you accomplish the things that matter most to you.
* We also work in collaboration with your other professionals - your accountant, your attorney – and anyone else involved in helping you in this regard. We believe it’s important everyone is on the same page and working towards the same goals – the ones you’ve defined.
* As I've mentioned before, we see Wealth Management as an ongoing process. To ensure that we continue to meet your goals and objectives, we will help you prepare for, or react to, Critical Financial Events-basically anything and everything that pertains to and effects your finances, either now, or in the future.
  + *Optional: Show CFE Graphic*
* Anyone of these Critical Financial Events may necessitate a change in your plan, so it is very important that you let us know if anything has happened regarding your wealth that may require us to make an adjustment to our game plan.
* Do you have any questions [Client]?