The 2nd Appointment Graphic

Step 9

- Send 2nd Appointment Confimation Letter and Checklist
- •Send out 7-10 business days prior to meeting

Step 10

- Make 2nd Appointment Confirmation Call
- •Use 2nd Appointment Confirmation Script
- •Make call 2 business days prior to the 2nd Appointment

Step 11

- 2nd Appointment Meeting
- •Establish rapport (use their Client Profile information) & share Agenda

Meeting 1 minute

- Meeting Overview
- •Use the 2nd Appointment Agenda
- •Use the 2nd Appointment Advisor Script

Meeting 2-3 minutes

- Review of Our Practice & Approach
- •A brief review, key messaging & the Introduction Process

Meeting 5 minutes

- Review Your Goals & Objectives
- •Use the information collected in the 1st Appointment



Meeting 40 minutes

- Your Current Circumstances
- •Use the Personal Financial Profile resource or alternative
- Review all items they brought to the meeting (statements, etc.)

Meeting 1 minute

- Meeting Wrap-Up
- •Conclude meeting and book the 3rd Appointment two weeks out

The 2nd Appointment Page 1 Mindset Consulting