The Strategic Partners Checklist

Strategic Partner Name:

Steps to be carried out by the Financial Advisor are indicated accordingly below.

All other steps may be implemented by others on the team.

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Activity** | **Person Responsible** | **Completed on:** |
| 1 | Call to Set Meeting 1 – Their Office |  |  |
| 2 | Meeting 1 Confirmation Call |  |  |
| 3 | **Meeting 1 – Their Office** | Financial Advisor |  |
| If they are a good potential FIT as a Strategic Partner: | | | |
| 4 | Call to set Meeting 2 – Your Office |  |  |
| 5 | Send Your Introduction Kit |  |  |
| 6 | Send Confirmation Letter/Map |  |  |
| 7 | Meeting 2 Confirmation Call |  |  |
| 8 | **Meeting 2 – Your Office** with Agenda | Financial Advisor |  |
| 9 | Make Assessment of FIT | Financial Advisor |  |
| If they are a FIT as a Strategic Partner: | | | |
| 10 | Code them accordingly on CRM |  |  |
| 11 | Activate Strategic Partner Service Model |  |  |
| 12 | Connect with them on LinkedIn | Financial Advisor |  |
| 13 | Send Welcome Card & Gift |  |  |
| 14 | Send Welcome Letter |  |  |