## Strategy 5: Nail the Wealthy Client Experience

## Templates for Emails for Online Meetings

## Templates for Agendas and Run Sheets for Online Meetings

[Online Discovery Meeting Confirmation Email Template 2](#_Toc46330092)

[Agenda for Online Discovery Meeting 3](#_Toc46330093)

[Run Sheet for Online Discovery Meeting 3](#_Toc46330094)

## Online Discovery Meeting Confirmation Email Template

Subject line: Our upcoming Discovery Meeting

Dear prospective client's first name,

This email is to confirm our appointment for day, date, at time. As we discussed, we will be meeting over name of video conferencing platform. You can access our meeting room here. Please plan on the meeting lasting about 90 minutes.

We all know what it’s like when technology does not work properly, and we want to make sure that no technology issues arise that could interfere with us getting to know you. To that end, a member of my team, name of team member, will reach out to you to set up a quick call to make sure that you are all set with the video conferencing platform. And we’ll be happy to send you a web cam if you need one.

At our meeting, we will ask you a series of questions to really understand what is most important to you, what you would like to accomplish and what keeps you awake at night. We will determine where you are now, where you want to be and any gaps or obstacles that stand in the way. It’s our chance to get a very clear picture of you so that we can guide you in how best to achieve your most important goals.

To help us obtain a comprehensive view of your financial situation, please collect the following:

1. Your last two years’ income tax returns
2. Any recent financial statements prepared for refinancing, etc.
3. Current bank statements, if any
4. Current mutual fund statements, if any
5. Current brokerage statements, if any
6. Current mortgage statements, if any
7. Current life insurance policies, if any
8. Current employee benefit statements, including those for 401(k) or other retirement plans, if any
9. Any wills or trust documents
10. Anything else you believe would be useful for me to gain a better understanding of your financial situation

Please download and email these documents to our secure email: email address. Alternately, you may mail or FedEx hard copies to our office at this address: mailing address.

If you have problems locating any of the information, please give me a call so we can help direct you to the proper source to obtain the necessary information.

We look forward to exploring how we might be able to assist you in achieving your financial goals.

Sincerely,

Financial advisor's name

## Agenda for Online Discovery Meeting

**Prospective client's name**

**Discovery Meeting Agenda**

Date of meeting

Time of meeting

1. Ideal outcome for our meeting
2. Overview of agenda
3. Total Client Profile interview
4. Overview of next steps in our wealth management process
5. Definition of wealth management
6. Schedule the Investment Plan Meeting, if appropriate

## Run Sheet for Online Discovery Meeting

|  |  |  |
| --- | --- | --- |
| **Time** | **Minutes** | **Topic or Activity** |
| 0:00 | 2:00 | Greeting and exchange pleasantries. |
| 2:00 | 1:00 | Acknowledge the prospective client’s desire to explore working together. |
| 3:00 | 5:00 | Explain the ideal outcome of the meeting and how you will conduct it, with overview of the agenda. |
| 8:00 | 60:00 | Conduct the Total Client Profile interview and complete the mind map. |
| 68:00 | 6:00 | Describe next steps in wealth management process. Show the first page of the two-page graphic overview. |
| 74:00 | 6:00 | Define wealth management. Show the second page of the two-page graphic overview. |
| 80:00 | 3:00 | Tell your personal story. |
| 83:00 | 2:00 | Schedule the Investment Plan Meeting. |
| 85:00 | 1:00 | Wrap up and end the meeting. |