## STRATEGY 7: BECOME THE EXPERT THE WEALTHY WANT

## Supporting Tools for Conducting Presentations

[Supporting Tools for Conducting Presentations 1](#_Toc19274828)

[Sample Calendar Announcement 2](#_Toc19274829)

[Invitation Letter Template 3](#_Toc19274830)

[Registration Phone Script 4](#_Toc19274831)

[Sample Confirmation Letter 4](#_Toc19274832)

[Presentation Response Sheet 5](#_Toc19274833)

## Sample Calendar Announcement

For immediate release

The Elite Wealth Manager Firm   
555 Grand Avenue  
Any City, AA 11111  
Contact: Joe Brown  
888–555–5555  
jbrown@elite.com

Presentation: Elite Wealth Planning

Are you on track to achieve all your most important financial goals? In today’s complex financial environment, it’s easy to second-guess yourself. To gain peace of mind, you need a high-quality approach that addresses not only your investments, but your entire financial picture.

Join us for a presentation that will introduce you to elite wealth planning—a process for bringing technical expertise together with the human element to help you achieve your key goals. You will discover how elite wealth planning is used to help manage some of the life situations many people—wealthy and not-so-wealthy—must confront, including marriage and related issues, family businesses, educating and empowering heirs, and health issues. you will also have the opportunity to obtain a second opinion on your current investment portfolio, at no cost or obligation.

The presentation will be held at The Ritz-Carlton Hotel, 555 Main Street, Any City, on Thursday, March 13, from 6:30 to 8:00 p.m. Presentation leader will be Joe Brown, CEO of The Elite Wealth Manager Firm.

This presentation is free.

For more information and to register, please call Marlene Martin at 888–555–5555.

## Invitation Letter Template

You may customize this invitation as needed and print on your business letterhead.

Prospective client’s name   
Prospective client’s address

City, state, ZIP code

Dear Prospective client’s name:

Are you on track to achieve all your most important financial goals? In today’s complex financial environment, it’s easy to second-guess yourself. To gain peace of mind, you need a high-quality approach that addresses not only your investments, but also your entire financial picture.

I’d like to invite you and spouse’s name, if known to attend our complimentary presentation, *Elite Wealth Planning*.

This is what you will discover:

* How elite wealth planning combines technical expertise with the human element to help you achieve key goals
* How elite wealth planning is used to help manage some of the life situations many people must confront, including marriage and related issues, family businesses, educating and empowering heirs, and health issues
* How to find an elite wealth planner

We will also offer you the opportunity to obtain a second opinion on your current investment portfolio, at no cost or obligation. This will show you what changes, if any, you need to make to better position your portfolio to achieve your financial goals.

This presentation will provide you with key tools to make informed decisions about your money, so please plan to attend.

*Elite Wealth Planning*  
Date: Date

Time: Time  
Location: Location

Seating is limited. Please call team member's name at phone number to reserve your space.

This presentation is part of an ongoing educational series offered by The Elite Wealth Manager Firm. There is no charge.

Sincerely,

Financial advisor's name

## Registration Phone Script

Hello, this is \_\_\_\_\_\_\_\_speaking. How may I help you?

In order to make our presentation as valuable as possible for you, I would like to ask you a few questions. First, let’s start with your contact information so that we have you properly registered.

Your name?

Your mailing address?

The best number to reach you?

Your email address?

Will anyone join you at the presentation? (If yes, then ask for the same contact information for the additional person.)

How did you hear about our presentation?

Mr./Ms. (name), you are now confirmed for (name of the presentation) on (date and time), at (location). I will send you a confirmation letter with a map of the location today. I look forward to meeting you in person at the presentation.

## Sample Confirmation Letter

Dear (name):

This letter confirms your registration for (name of the presentation) on (date and time), at (location). I have also included a map of the location for your convenience.

We believe you will find this presentation to be extremely helpful in gaining a better understanding of how best to achieve your most important financial goals.

We look forward to meeting you in person.

Best of success,

Wealth Manager to the Affluent

## Presentation Response Sheet

You may customize this response sheet as appropriate for your needs and print on your business letterhead.

**Confidential Response Sheet**

|  |  |  |
| --- | --- | --- |
| Name | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Address | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| City, state, ZIP | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Phone number | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Email address | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| What did you like most about today’s presentation?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| What key concept did you find most valuable?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| What do you wish you had heard?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| □ | Yes, I am interested in receiving a complimentary second opinion on my finances. Please contact me to schedule an appointment. | |
| □ | I might be interested in a second opinion, but I have a few questions that I would like to discuss first. Please contact me to discuss these questions. | |
| □ | No, I am not interested in a complimentary second opinion on my finances. | |