



## **80/20 – Case Design Program**

Welcome to the Case Design program! You've gone through the Mentor Program, learned the strategies, and you are ready to handle the Numbers appointment, Philosophy of Money appointment, strategy appointment, subscribe to any educational software that is needed to educate your clients in your meetings, including any additional tools for analysis to close your cases. Below the Case Design Program video in Step #3 is the link to submit your preliminary case design and a short summary of what to expect. Here we will lay out a more in-depth detail explanation of what this program entails.

*\*Do not schedule your Numbers Meeting (M2) unless your preliminary case design is approved.*

### **What's included in the Case Design Program?**

- All Client Appointments Run by You – After our team provides you with the case design, you will run all appointments with your client. Your first appointment after the free evaluation is the Numbers Appointment. You will find the Number Appt. Questionnaire in the attachments on the 80/20 Case Design Program tab.
- Circle of Wealth Software (COW) - You are not required to subscribe to this software. However, if you went through the Mentor Program, you have seen how important it is to educate your client to avoid any pushback.
- Illustrations – You are required to provide your client with illustrations from any preferred carriers.
- Insmark Analysis – You are not required to subscribe to this. However, if you went through the Mentor Program, you have seen how important it is to provide an analysis to your client.
- Paperwork & Underwriting – You are responsible for completing all paperwork and seeing it through underwriting (i.e. life insurance, annuities, managed money, etc.).

In order to determine if your family qualifies for this program, you are required to submit a preliminary case design after your free evaluation. Please use the green hyperlink below the Case Design Program video to submit your client's financial information. In this link, you will be required to enter your credit card information and will not be charged unless your case is approved. By signing the agreement in the preliminary case design link, you agree to the pay structure below:

- Case Design Without Retirement Timeline - \$350\*
- Case Design with Retirement Timeline – \$500\*

\*In the event that a case closes, any of the above payment scenarios will be credited back to the agent for use on a future case design as long as John McDonough or another authorized person from Studemont Group Planning is on the case for 20%.

Once our department reviews the preliminary case design, you will receive an **APPROVED, PENDING OR DECLINED** email. Below you will find details on what each email consists of for each scenario and your required steps.

**APPROVED Email** -

**Step 1: Schedule Numbers Meeting (M2):**

- Notify your client that they have qualified for a long-term college & retirement financial plan.
- Request College Financial Planning Questionnaire (CPQ) & the List of Documents Needed. Both documents will be attached to this email and will be posted in Step 3 tab).
- Schedule your Numbers Meeting (M2) with your client at least 2 weeks out.

**Step 2: Upload Documents** - An upload link will be provided for you to upload your clients planning questionnaire and financial documents. Every family will have its own unique link.

*\*Your case design will not begin until our team has received all necessary documentation & you've run your Numbers Meeting (M2).*

**NOTE: Please upload each document separately. Scanning all documents into 1 PDF will not be accepted.**

**Step 3: Case Design Will Begin** - After our team receives all required documents and you've run (M2), case design will begin & you will receive your case design within 7-10 business days.

**Step 4: Schedule your Philosophy of Money Meeting (M3)** – You will run (M3) and any subsequent meetings thereafter and are required to update our team on the results of each meeting by the end of the first business day after the meeting.

***\*Refer to the agreement you received in the preliminary case submission confirmation email.***

**Step 5: You Sell the Case!** – As contractually agreed, you are required to add us to all cases sold (i.e. Life Insurance, Annuities, Managed Money, etc.).

\*As mentioned above - In the event that any of the recommended case closes, you can choose 1 of 2 below options for your fee as long as John McDonough or another authorized person from Studemont Group Planning is on all sold cases for 20%.

- Opt to have the fee refunded.
- Roll the fee over as credit for your next 80/20 case

**PENDING Email** - If it is pending, we will send you an email requesting additional information.

**DECLINED Email** – If it is declined, we will send you an email stating the reasons for the declination. If you believe there is more information that may change your case, you may reply to the email with additional information we were unaware of. If it continues to be declined, your client's main point of contact for continued services is Peace of Mind College Consulting.