**“AFTER the LIVE WORKSHOP”**

**First Appointment**

**Goal:**

1. Move to appointment #2
2. Build Credibility (we own this piece)
3. Build trust (mutual ownership – is this a good fit)
4. First appointment time 60 minutes or less.

**Steps:**

1. Review the Blue Sheet and ask: What was the one thing you enjoyed most about the workshop?
2. I see on the Bed Sheet you have questions about . . .
3. Lead to the Fact Finder that provides the Social Security Report
4. During Fact Finder, the list of investable assets leads to discussion concerning Retirement Income, Lifetime Income options, and the retirement plan the prospect has.
5. One a laptop, tablet – open to Riskalyze link and ask the prospect to complete the questions.
6. Provide the list of what to bring to provide PRIOR to the next appointment, and review fill what will be provided at the next meeting.
7. Review the accomplishments of today’s meeting.
8. Ask the final question: Is there any reason you can think of not to proceed to the next meeting?
9. Set the next appointment.

**What to provide PRIOR to Next Appointment #2:**

1. Social Security Income for both spouses at age 62, 67, and 70
2. Financial statements with names and account numbers blacked out

**What to provide AT the next appointment:**

1. Monthly income needed in retirement.
2. Monthly expenses in retirement

**Review what will be provided to the prospect at appointment #2:**

1. Social Security Report
2. Riskalyze Number
3. Information in various options for retirement income based on conversation from appointment #1

**Second Appointment**

**Goal:**

1. Move to appointment #3
2. Build Retirement Budget Spreadsheet
3. Move to red money, green money, purple money decision for illustration purposes
4. Review Social Security Report
5. Review Riskalyze Number and how it relates to Illustration and recommendations for appointment #3
6. Enhanced credibility and trust.
7. Second appointment time 60 minutes or less.

**Steps:**

1. Warm-up and review – ask “What was the one thing you enjoyed most about appointment #1?”
2. Review Social Security Report
3. Review Riskalyze Number and how that relates to illustrations and Retirement Budget spreadsheet
4. According to conversations about Riskalyze and Retirement Budget, move discussion to red money, green money, purple money.
5. Explain our processes and products. Discuss expansion of Retirement Budget into Retirement Roadmap and introduction of the RWA team, FIA, or both.
6. Ask the final question: Is there any reason you can think of not to proceed to the next meeting?
7. Set the next appointment. Follow up for next appointment.

**Third Appointment**

**Goal**

1. Write FIA application and/or finalize RWA Retirement Roadmap process for investing with RWA.
2. Prospect to meet with the team and see the Retirement Roadmap for their investments and/or FIA illustrations and how those fit into their retirement future.
3. Secure the professional relationship for the future.

**Steps:**

1. Warm-up and review – ask “What was the one thing you enjoyed most about appointment #2?”
2. Introduce RWA team and Retirement Roadmap and/or
3. Introduce FIA illustrations.
4. Discuss the process of each process and final steps.
5. Ask prospect for questions and concerns.
6. As for the final question: Is there any reason you can think of not to proceed to the next step?
7. Start the application process.
8. Make a final review of the process and see what additional questions prospect may have.
9. Explain the follow-up process from our office – a Monday status call until final funds transfer.
10. Final meeting after funds have transferred.
11. Timeline review leading to one year review.
12. Explain contract delivery process.
13. Thank the client and remind them of the next steps.