BEACON WEALTH

All communications with a prospect should be structured and designed to build the prospect's Confidence and Trust in Beacon Wealth Consultants, Inc. and to instill the belief that all the members of the Beacon Wealth Team value them as a person and individual.

Call the Prospect Before the Meeting and:

- ✓ Confirm the meeting & ask if they received the prospect kit
- ✓ Remind them to complete the Beacon Confidential Questionnaire prior to the meeting if possible and to bring it to the meeting with them
- ✓ Ask them to bring the items listed on the Initial Consultation Checklist, too
- ✓ Ask if there is any particular topic, subject or goal the prospect is wanting to cover in the meeting
- ✓ Add Notes from this call to Redtail, particularly anything learned from the prospect that will help shape and clarify the agenda for the discovery meeting

For Guidance on entering prospects into Redtail, Click Here to open a CRM Architecture map that explains Contact Status, Category, Keywords, etc.