



The first impression is the most important. Solidify and expand on the prospect's Confidence and Trust in you and Beacon Wealth Consultants, Inc. by making that GREAT first impression.

Considerations for the Initial Meeting:

- ✓ Reception and Welcome
 - How is the Prospect greeted?
 - Does the receptionist (if the one who greets the prospect) hold a conversation?
 - How does the greeting help (or hurt) the perception the prospect gets of our values or brand promise?
 - Does the receptionist know their names and ready to greet them in advance?
 - How is the prospect treated if the advisor is running late or delayed?
- ✓ Office and/or Conference Room
 - Does the office appear neat and orderly? Does it portray a professional atmosphere?
 - Is the conference room neat, clean and ready for the meeting?
 - Chairs arranged
 - Old water or soda bottles thrown away
 - Table clean of paperwork from previous meetings and free of crumbs and clutter
 - Is the prospect's backup prospect kit ready and available?
 - If using a TV, is a "Welcome" screen up, personalized with the prospect's name?
- ✓ The Meeting
 - Does the advisor verify the length of the meeting; and then stick to that timeframe?
 - Do we go over the agenda and the desired outcomes; and stick to those?
 - Is the advisor dressed professionally, sitting respectfully and portraying a proper demeanor?
 - Is the advisor addressing both husband and wife equally (i.e. not addressing one more than the other)?
 - What is being done to engage the less engaged prospect when necessary?
 - Are benefits, advantages and values being discussed more than features and procedures?
 - i.e. does the client hear more "we, we, we" or more "you, you, you" and the outcomes for them?
- ✓ End of the Meeting
 - Does the meeting end on or ahead of time?
 - Does the advisor walk them out?
 - Are the next steps clear for both what the advisor will do and what the client needs to do?
 - Is the next meeting scheduled?
 - If not, what is needed to make the next appointment?

Strategic Goals:

- Prospect anxiety is reduced
- The first steps of true trust and confidence is built with the prospect
- Risk is lowered by ensuring the prospect knows what to expect with the relationship