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

### **Initial Meeting Deliverables:**

- ✓ A second complete Prospect Kit
  - Have a second prospect ready encase the prospect does not bring something from the original kit sent to them or they never received the first one
- ✓ Agenda for the Meeting
- ✓ Team Member Biographies
  - You can get the biographies by [Clicking Here](#)
- ✓ Beacon Wealth Firm Overview Marketing Material, as appropriate
- ✓ Beacon Wealth branded Gift (optional at this stage)
  - Note: not all prospects need a gift
  - If given, keep low cost such as a BWC branded coffee mug
- ✓ Other Items as necessary based on information provided by prospects on their needs
  - Tax Planning information
  - Estate Planning information
  - 529 and education programs