



It is important to solidify and expand on the prospect's Confidence and Trust in Beacon Wealth Consultants, Inc. that was generated through all communications by preparing for the first meeting. All preparations should be geared to foster the prospects perception of Beacon's value of them as a person, and to set the advisor up as a highly competent and knowledgeable professional.

## **Prepare for the Initial Meeting:**

- ✓ Beacon Wealth provides much more than investment services. We provide comprehensive wealth management, investment services, tax planning, estate planning and legacy coaching. The first meeting may open the door to many more opportunities to educate and help a future client and advocate for Beacon. Use the following tools to prepare questions and an initial plan outline that will help you get more out of the vision clarifier and discovery process at the first meeting.
- ✓ Review the planning considerations and topics using the Planning 360 Tool which can be found at:

<https://planning360tool.com/>

- ✓ Money Guide Pro is Beacon Wealth's primary planning platform. Before your meeting, create Money Guide Pro account for the prospect at:

<https://www.moneyguidepro.com/ifa/>

Contact the Home Office if you need assistance in logging in to either of these web sites.