BEACON WEALTH

Congratulations! You have meet with your prospect and you had a productive and beneficial meeting for both of you. Now it is time to review everything discussed, make notes as appropriate and prepare for the next steps.

Post Initial Meeting Review:

- ✓ Review the meeting agenda and your notes to refresh your memory of items and topics discussed, the prospects desires and goals and what next steps were discussed.
  - Make Notes in Redtail for the client so your notes and these items are captured in the CRM
- ✓ Review the clients Confidential Questionnaire
  - Make a list of what items or information you are missing in order to move to the next steps.
  - How will you receive the missing information? Was it discussed at the meeting?
  - Make Notes in Redtail
- ✓ Set Tasks and Reminders in Redtail for all follow up items that needs to happen for preparation for the next meeting or engagement with the prospect. Add the appropriate BWC team members, as applicable.

Missing Information and Items	**Follow Up Tasks with Completion Date** (Put into Redtail)