



Do not let the momentum and interest you built during the initial meeting wane. Thoughtful, strategic and timely engagements with the prospect will continue to build confidence and trust that drives the momentum toward turning the prospect into a client.

Initial Meeting Follow Up:

- ✓ Within 24 hours of the meeting, hand write a Thank You card and mail to the prospect. This is a key task in showing that you value the prospect as a person and are looking forward to working with them in the future.
- ✓ Within 5 business days, mail the prospect a copy of the Vision Clarifier that was completed during the Initial Meeting, with a cover letter.
 - Type your notes on a clean Vision Clarifier so that it is easily read and understood.
 - If you must elaborate to fully convey the ideas discussed, do so. More information is better.
 - Upload the typed Vision Clarifier into the prospect's documents section (Not Redtail Imaging but in the Redtail CRM System) in Redtail
 - The cover letter should thank them for their time again, explain that the copy of the Vision Clarifier is for their records, include any follow up actions that you are doing for them or they owe you, and confirmation of any already scheduled follow up meetings or when you would like to meet again.
 - [Click Here](#) for a cover letter template.
- ✓ Based on your conversation with the prospect and where they are in the decision process, provide them additional material to educate them on Beacon Wealth, BRI and our investment philosophy.
 - Do not overwhelm the prospect by sending too much.
 - [Click Here](#) to find additional Marketing Material.
- ✓ Update or create 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.
- ✓ Set a reminder in Redtail about one week prior to the next meeting to contact the prospect and remind them of the information that you still need from them so they can compile it before the meeting. This reminder should not replace the meeting reminder you make the day prior to the scheduled meeting.