The 45-Day meeting is an extremely important meeting in the client's journey as well as key engagement in assessing the level of stress or buyer's remorse your new client may be experiencing. The 45-day timeframe is a target for scheduling the meeting about 45 days after your client signed his paperwork. However, to create a great environment to impress your client and continue to build that confidence and trust key to your relationship with the client, make sure the 45-Day meeting is scheduled after these tasks/events are complete.

The 45-Day Meeting

1. All accounts are opened.
2. Data feeds for all accounts are active in Tamarac.
3. The client's Performance Group, Household and Client Portal are established in Tamarac. Coordinate with the Home Office for this.
4. The majority of the assets have completed transfer to the new accounts and is correctly displaying in Tamarac. You do not need to wait until all assets transfer since some transfers may take several months.
5. The transferred assets have been invested and data is displaying correctly on the client's portal.
6. The Welcome Gift has been delivered.

Order a Welcome Gift

A welcome gift is a great item for your client that is another major gesture to help your client move past any buyer's remorse and doubt. As such, the gift should be something that your client will see as thoughtful and memorable. There are many options for what gift you send, and here are some guidelines:

- Do not logo your gifts. Give something to your client that does not look or feel like promotional material.
- It is preferred that the gift arrives in the mail versus taking it to the 45-Day meeting. A surprise gift in the mail will add to the positive feeling and memorable aspect of the gift.

- Try to select a gift that will resonate with your client. For example, if your client is a specific football team fan, select something that is logoed for their team; if your client likes to cook, get them something for their kitchen, etc.
- It is OK to select gifts based on the level of investments your client has entrusted to you. But the gift should be commensurate with that level of trust. Below is the recommended gift cost for the level of household assets you are managing for your client:

Client Initial Investment (Household) Amount	**Recommended Gift Amount**
< $50,000	$50
$50,000 - $100,000	$75
$100,000 - $500,000	$150
$500,000 - $1,000,000	$250 *
$1,000,000 - $5,000,000	$250 *
> $5,000,000	$250 *

* SEC Regulation prohibits giving gifts that have an aggregate value of $250 per year, so track your gifts and report as outlined in the Beacon Wealth Written Supervisory Procedures and Code of Ethics manual.