



The Review Meeting is primary venue that you will move your client from just a Phase 3 client to a Phase 5 client fanatic who is your unpaid sales force. ([Review the Phases of your Client's Journey HERE](#)) But there is so much more that you can and should do. We call this:

Communicate and Celebrate

The only way that a client will become a Phase 5 client is through a genuine and continually evolving relationship between you and your client. Communicate and Celebrate is two focus areas that can help you maintain and grow that relationship.

- **Communicate the Positive Impact of the Client's Investment Decisions**
 - Leverage any of the following means of communication we have to provide messaging to clients pertaining to the positive impact of the companies we're investing in. The goal should be to train clients to think in terms of social returns as well as financial returns.
 - **Shining Lights Spotlights – Blog Posts**
 - [Introduction to Shining Light Companies](#)
 - [Shining Light Spotlight \(blog\)](#)
 - [Kingdom Impact Report](#)
 - [“How Your Investment Dollars Positively Impact the World” Special Report](#)
- **Celebrate with Your Client**
 - Never hesitate to celebrate life events, milestones and with your client. When you acknowledge major and minor milestones that your client experiences, you are creating a very personal connection that your client will never forget. There are many different ways to celebrate from just sending a thoughtful, handwritten card to sending an unexpected gift. Just

like your initial welcome gift, these celebrations need to be thought thru and appropriate. Here are some milestones you could consider celebrating with your client, but every client is different, and this list is not all encompassing nor would it apply to all clients:

- One-year, five-year, ten-year, 15-year and 20-year anniversary as a client
- 50% Increase in Initial Investment
- Double Initial investment
- Triple Initial Investment
- Substantial Net New Investments
- Marriage
- Marriage of a child
- Birth of a child or grandchild
- Job change or start of a new business
- Retirement
- High School or College graduations
- New House Purchase
- Personal Accomplishments and Accolades
 - A hole in one in golf
 - Awards and promotions at work
 - Awards and appointments outside of work
 - Etc.

NOTE: 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.

In order to know when to celebrate, information on your clients must be collected and updated in the Beacon Wealth CRM, Redtail. You should be gathering and updating client information from the very first meeting. And this information is updated and confirmed at every subsequent meeting. Keeping up-to-date information in the CRM system will make knowing the proper time to celebrate with your client easier and almost automatic.

Besides the basic information that you would see in the CRM for a client, you need to gather further information which includes, but not limited to:

- Hobbies
- Family dynamics and details

- Favorite sports, sports teams, restaurants, etc
- Church affiliation
- Social clubs and organizations
- Etc.