CLIENT COMMUNICATION PREP SHEET:

Three Questions to Address When Sharing the Value of Your Financial Planning Services

YOU'RE DOING GREAT WORK!

As a financial planner, you have a tremendous opportunity to communicate the value of financial planning in a clear and accessible way.

Your clients may never have experienced true financial planning, and you have the opportunity – even the privilege – to show them.

1. WHO DO YOU SERVE?

Target Professions:

Target Values:

Target Income/Assets:

Target Life Stages:

2. WHAT PROBLEMS DO YOU SOLVE?

- ☐ College Planning
- ☐ Employee Benefit Reviews
- ☐ Retirement Projections
- ☐ Student Loan Repayment
- ☐ Budget & Cash Flow Management
- ☐ Social Security Elections
- ☐ Insurance Reviews
- ☐ Tax Planning
- ☐ Investment Management
- ☐ Estate Planning
- ☐ Buying a House
- ☐ Executive Compensation Planning
- ☐ Other:

3. WHAT'S YOUR PROCESS?

- What information does the client need to provide to get started?
- How many meetings will take place in the first year?
- Does meeting frequency change after year one?
- What do meetings typically entail? (Place, duration)
- What deliverables do you provide?
- What technology will the client need to set up?
- How should a client contact you when something comes up?
- What are your fees and how does the client pay you?
- Are there any other fees or expenses, to you or anyone else?

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