BUILDING THE ULTIMATE INTRO MEETING

Leveraging Psychology To Effortlessly Convert Prospects
Without Being Salesy

BRENDAN FRAZIER | WIRED PLANNING | THE HUMAN SIDE OF MONEY

INSIDE THE PROSPECT'S MIND

Inside The Mind of a Prospect

- **Why Are They Here?**
  - Nobody wakes up and says “I’m excited to schedule an hour to talk with a stranger about my money!”
  - Something prompted them to reach out and take the time to meet
- **What Are They Feeling?**
  - Anxious, Uncertain, Vulnerable
  - The #1 cause of financial advisor anxiety is lack of financial literacy (jargon)

Inside The Mind of a Prospect

- **Nobody buys a plane ticket. They buy the destination.**
- **90% of decisions are made with emotion and backed by logic.**
- **People are motivated to cure pain. Focus on the pain.**
    - 70% of buying decisions made to avoid loss rather than achieve gain

What Prospects NEED

Do I like you?

Do I trust you?

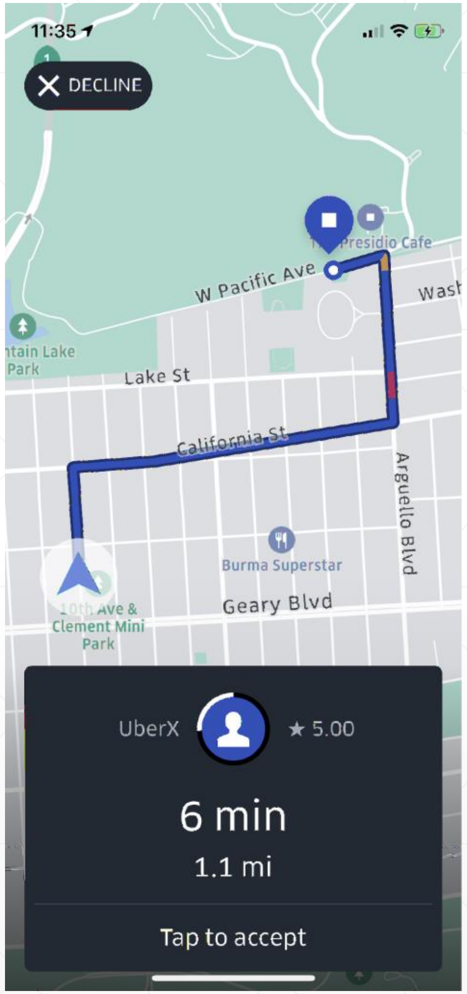
Am I certain you can:

1) Solve My Problem

2) Deliver My Outcome

PREPPING THE PROSPECT FOR SUCCESS

The Misery of Uncertainty



Pre-Meeting Email

WIRED PLANNING

The Human Side of Advice

Pre-Meeting Email Template

Hi Mr. and Mrs. Corley,

I'm looking forward to our conversation next Thursday!

The purpose of our time together is to get to know each other better, talk more about <*the problem/pain/reason they reached out using their words*>, and provide clarity on the best path forward.

We'll start by continuing our conversation around <*the problem/pain/reason they reached out using their words*>.

Then, we'll make sure you have a chance to ask any and all questions on your mind.

And, we'll wrap up by making sure you know exactly what to do next to <*resolve the problem/pain/reason they reached out*>.

There's no need to bring anything with you unless you think there is something that will be helpful for the conversation.

In the meantime, here are a few things for you to look at prior to our conversation:

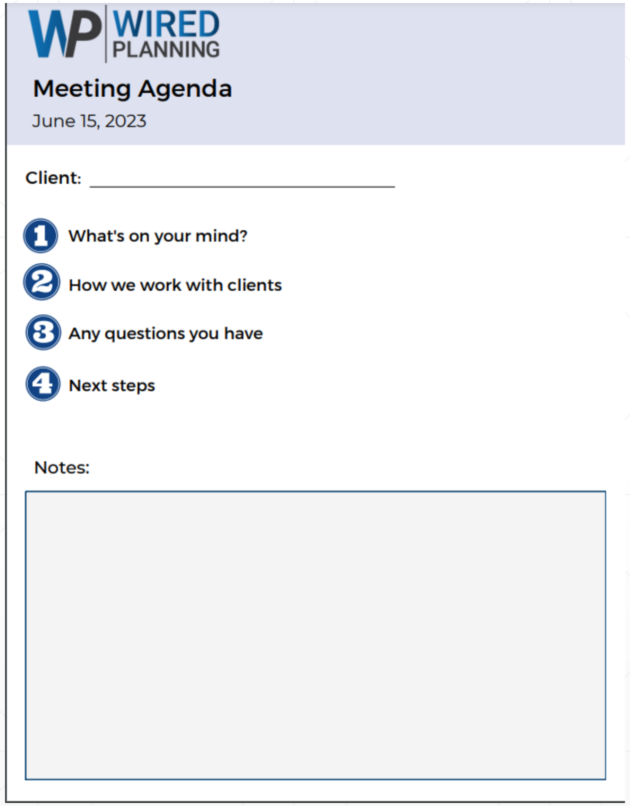
- Our Firm and Our Process (PDF or Video)
- Top Questions To Ask A Financial Advisor (PDF or Video)

Lastly, if there's anything not on here that you want to make sure we talk about, reply to this email and let me know!

Looking forward to seeing you next week!

- Send an email 3-7 days prior to the meeting
- Outline what to expect and provide more detail around the types of questions you're going to ask.
- BONUS: Include a video with information about your firm, your expertise, your process (Or a link to your website).

Pre-Meeting Agenda


WIRED PLANNING

Meeting Agenda

June 15, 2023

Client: ______________________

1. What's on your mind?
2. How we work with clients
3. Any questions you have
4. Next steps

Notes:

- Provides a visual roadmap of the conversation
- MUST INCLUDE:
  - What’s on your mind? (First Item)
  - Next Steps (as the very last item)

THE MEETING

Inside The Meeting

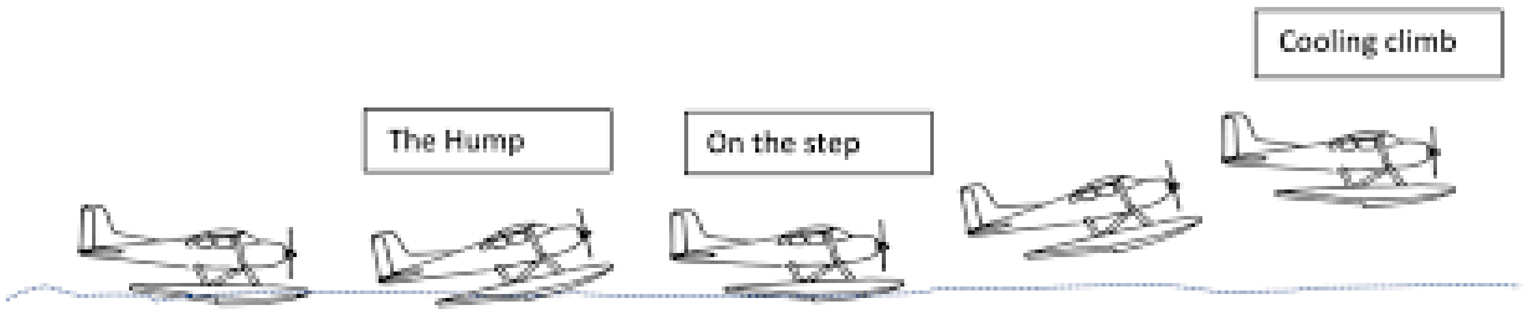
- **The Trust Zone**
- **The Sniper vs Shotgun Approach**
- **The Platinum Rule of Prospect Meetings**

“Client satisfaction in a first meeting is directly related to the amount of air time they get.”

Dr. Moira Somers, *Advice That Sticks*

THE TRUST ZONE

The Trust Zone



Like an airplane taking off, the hard work to create an atmosphere of trust and connection happens in the beginning.

The Trust Zone

- You have to create conversational flow that gets them out of their HEAD and into their HEART.

- Ask “3E” Questions:
  - Easy
  - Exciting
  - Emotional

- Examples:

➢ *“How did you end up in Nashville?”*

➢ *“How did you get the idea to start your business?*

➢ *“How did you two meet?”*

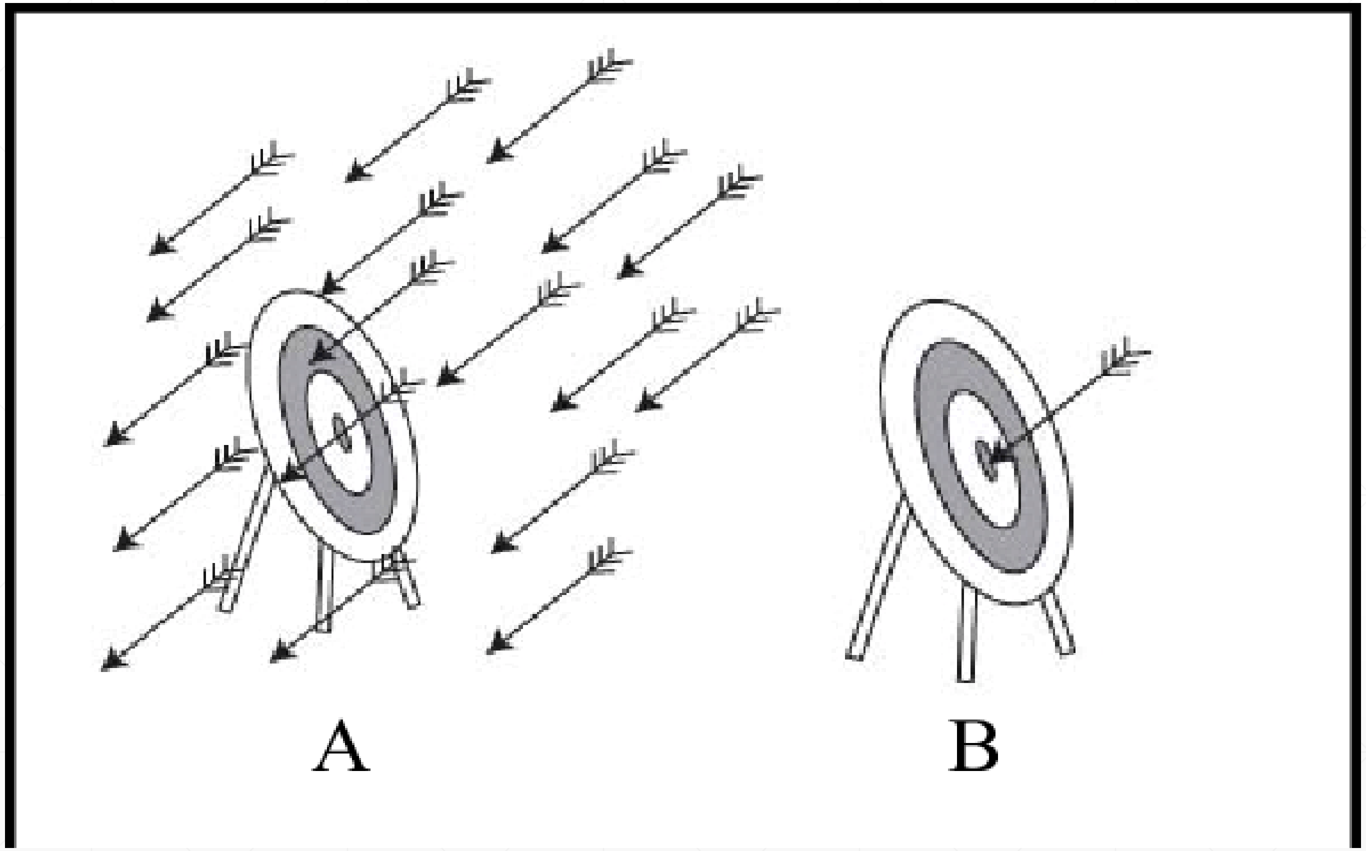
SNIPER VS SHOTGUN APPROACH

Sniper vs Shotgun Approach

Financial Planning & Consulting

- Investment allocation advice
- Portfolio reviews
- Financial goal plan check-ups
- Real-time comprehensive financial plan
- Detailed reporting and progress tracking
- Retirement and life transition planning
- Multiple goal planning
- Employee benefit review
- Education planning
- Year-end tax planning
- Personal Insurance Planning
- Basic estate planning
- Executive compensation and stock options
- Charitable planning techniques
- Complex trust and estate planning
- Business succession planning
- Family Wealth Planning
- Full collaboration with 3rd party professionals

Sniper vs Shotgun Approach



Focused on your value

Focused on their problem

THE PLATINUM RULE

The Platinum Rule of Prospecting

Let prospects proceed the way THEY want to proceed!

- *“How would you like to proceed?”*
- *“At this point, I’m assuming you have some thoughts on what you want to do next?”*

The BYIM Challenge

Build Your Ultimate Intro Meeting In 4 Weeks

- **4 modules in 4 weeks**
- **See what other advisors are building**
- **Brainstorm and discuss along the way**
- **Starts January 8th, 2024**

: brendanfrazier@wiredplanning.com

Plans and pie charts don’t change lives.

People do.

www.wiredplanning.com

Brendan Frazier – Wired Planning

MEETING RECAP EMAIL

Meeting Recap Email

WIRED PLANNING
The Human Side of Advice

Post-Meeting Email ("Yes")

Hi Mr. and Mrs. Corley,

I enjoyed our conversation yesterday!

<Insert something that you talked about during the trust zone>

Anyways, I know we talked about a number of different things, but here's what I heard:

- *<Why they reached out>*
  - You don't want to be a 73-year old who hates his life
- *<What they want to do to solve the problem>*
  - You need some help choosing the right accounts and how much to save in those accounts
- *<Confirm they're ready to act>*
  - You want to figure this out as soon as possible

If there's anything you would change or add, let me know.

As I mentioned yesterday, the next step towards getting you there is the Discovery Meeting, where we'll talk more about what's important to you and your overall financial situation.

Click here to get that meeting scheduled (We highly recommend finding a time NO MORE than two weeks out)

And, here's an overview of the process if you need a refresher. (PDF or Video)

As always, if you have any questions, let us know.

- Send an email 24-48 hours after the meeting
- Recap what you discussed *in their words*
- Outline next steps and what comes next