New and Existing Client Talking Points

New Client

- Before we get started
  - Fill out assessment to get to know them better
  - Information to get
    - Name(s)
    - Email(s)
    - How many heirs/children
  - Send assessment
  - Review 1-2 weeks prior to meeting with the client

Existing Client

- We have a new tool that you'll find valuable
- It's our wealth values assessment
- Helps you gain insight into
  - Your COREvalues™
  - Your family's COREvalues™
  - You and your partners views on wealth
  - Lists your top priorities to tackle for the year
  - Insights on family culture
  - As well as tackling any obstacles that may be in the way
- Very non-intrusive assessment. May take up to 30 minutes to complete the whole assessment