

DON'T BE NEEDY: The 3-strike rule

FOLLOW UP #1 THE GENTLE NUDGE

"I'm following up to answer any questions you have and to see if you would like to schedule a time to talk with Adam to get answers to your most pressing questions and learn more about our approach to helping you retire with confidence."

It CANNOT be more important to you than them.

FOLLOW UP #2 THE FIRM REMINDER

"Hiring an advisor is a major decision, and one you shouldn't take lightly. Our job is to give you information you need to make a good decision and the opportunity to make the one that's right for you. Would it be alright if I will follow up with you in two weeks to see if you're ready? If it's not the right time, we'll make sure all your questions are answered and be here if you need help in the future."

L I M I T L E S S

FOLLOW UP #3 THE FINAL DECISION

"Hi (Jane), I know life gets busy. We haven't heard back on your decision to move ahead with your plan so I want to make sure you have our information for the future. Whether you plan with us or not, we do encourage you to find a trusted advisor when you're ready..."