Retiree Client Process

PROCESS REVIEW
(60 Minute Meeting)

1. Product Summary
2. Personal Introductions

INTRODUCTORY MEETING
(20-30 Minute Meeting)

1. Introduction Presentation
2. Complete Retirement Objectives Worksheet
3. Rough Populate the Blueprint
4. Set Next Appointment

PROTECTION
(60 Minute Meeting)

1. Review Protection
2. Complete Paperwork as Necessary
3. Set Next Appointment

INCOME/LIQUIDITY/LEGACY
(3 Meetings – 60 minutes each)

Meeting #1	Meeting #2	Meeting #3
1. Review Functions of Money in Retirement and Specific Retirement Objectives 2. Discuss Income/Liquidity/Legacy Tools 3. Sample Income/Liquidity/Legacy Output 4. Complete Paperwork as Necessary 5. Set Next Appointment	1. Review Income/Liquidity/Legacy Tools 2. Personalized Income/Liquidity/Legacy Comparison Options from the Retiree Cornerstones Blueprint™ 3. Set Next Appointment	1. Implementation of Desired Income/Liquidity/Legacy Option 2. Set Next Appointment

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