



Date Created	Last Modified
7/7/2014	11/21/2016

“FIND THE MONEY” CHALLENGE

LEAD-IN

We try very hard to anticipate when you might need financial advice so we can be prepared for it. What I would like to do, if you have a second or two, is run a few questions by you to see if there is anything coming up I/we need to be prepared for. May I check these with you now?

QUALIFICATION NOW

Are there any financial needs (I/AdvisorName) should be aware of you may need help with now?

U.S. Any bonds, CDs, or annuities maturing? — Any retirement accounts left with a former employer? Any investments at a bank or perhaps another brokerage firm you’re not happy with?

Canada. Any bonds, GICs, or annuities maturing? — Any retirement accounts left with a former employer? Any investments at a bank or perhaps another brokerage firm you’re not happy with?

QUALIFICATION LATER

Are you expecting to receive any lump sum payments, like a bonus, tax refund, or proceeds from an inheritance or property sale that (I/AdvisorName) I should be prepared for?

If Not Retired: When do you plan to retire? Ballpark, how much do you think you will have in retirement accounts when that happens?

ThankYouVeryMuch for your time and help!

“FIND THE MONEY” CHALLENGE

To find out how many assets your clients might hold that you do not now control, take the “Find the Money” Challenge. In the next week or so, when you have a client on the phone, run them through the “Client ‘Find the Money’ Script.” Note the results below. Figure out on average how much you found per client contacted. Multiply that by your number of clients. That's a rough idea of how much is out there.

#	Client Name	\$Now	\$Later	\$Total
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
21.				
22.				
23.				
24.				
25.				

Total Money Found:

\$ _____