

- Enhance Your Client Service Offering
- Improve Your Client Satisfaction
- Increase Your Client Business Productivity

Our **Advisors Alliance System** creates a team of collaborative advisors to provide comprehensive financial and estate planning services for Clients. At its core, it offers services to Clients that fully address their financial planning objectives in concert with their estate planning requirements. As their trusted Financial Advisor, you retain the full confidence of your Clients in providing personal financial planning expertise while offering them access to our comprehensive estate and tax planning services.

We have created this turn-key system with meeting formats and sample letters to send to your Clients to re-connect with them; inform them of this convenient alliance; and invite them back into your office.

## The Three-Step Advisors Alliance System

### ● Step 1 Client Fact-Finding Meeting

Conducted in the Financial Advisor's offices, the **Client Fact-Finding Meeting** takes 60 to 90 minutes. The Financial Advisor makes introductions between the Clients and Attorney. The Attorney talks with the Clients to gain a better understanding of them, their family, and their estate planning concerns and objectives. As the advisor with the personal and established relationship of trust with the Clients, the Financial Advisor actively participates. The Attorney shares information about estate planning issues that may be relevant to the Clients. The primary objective during this meeting is to gather information that will aid the Financial Advisor and Attorney in formulating strategies in preparation for the **Client Solutions Meeting**.

### ● Step 2 Advisors' Strategy Meeting

The **Advisors' Strategy Meeting** takes about an hour and will occur within four days after the initial **Client Fact-Finding Meeting**. The Financial Advisor and Attorney meet to discuss the planning options that exist, to narrow those planning options based on the collective knowledge of the professionals, and to finalize a set of planning recommendations. The planning recommendations are designed to meet the Clients' estate planning objectives while promoting the Financial Advisor's continuing role as the Clients' trusted advisor for continued financial guidance and, where appropriate, for expanded and enhanced financial advisory services.

### ● Step 3 Client Solutions Meeting

The **Client Solutions Meeting** takes about an hour and will occur within one to two weeks after the initial **Client Fact-Finding Meeting**. At the **Client Solutions Meeting**, the Attorney makes specific estate planning recommendations designed to address each of the Clients' concerns and estate planning objectives. These recommendations are presented in a graphic format that is designed visually to summarize the estate planning recommendations. After reviewing the solution and confirming the Clients' objectives, the Attorney offers the Clients a selection of estate planning packages, priced on a predictable flat-fee basis.

***Gain renewed face time \* Stay top-of-mind \* Achieve a reputation for Complete Client Care***

**Contact us Today for Details and to Get Started**

**Cheryl S. Johnson, Esq.**

(240) 988-5530

[Cheryl@SellersJohnsonLaw.com](mailto:Cheryl@SellersJohnsonLaw.com)

Sellers Johnson Law, PC  
1 Research Court Suite 450  
Rockville, Maryland 20850

