ADVOCATE SERVICE

Advocate Service Matrix Explained

CALL ROTATION

- A regularly scheduled, outbound call, used to touch base with your B and higher clients in a consistent and proactive manner. This is more of a social call not a financial update.
- Conversations are based on client FORM information.
- Call rotations are based on Client Classification and typically scheduled in 90-day, 180-day or 360-day intervals.
- Implementation of the call rotation will further your relationship with clients beyond business matters.

MAGAZINES OF INTEREST

- A process that results in a relevant and interesting magazine being sent to AAA and AA clients, with a personal note from the Advisor.
- Using the client's FORM information will be helpful in selecting an interesting and relevant Magazine.
- Magazines of Interest are scheduled to be sent in regular intervals.
- Implementation of the procedure will provide opportunities to connect on a level beyond financial matters and reinforce chemistry with your best clients.

ARTICLES OF INTEREST

- Demonstrate that you are paying attention to your client by recognizing their important life events or interests with appropriate articles from your inventory.
- Articles that focus on subjects of interest to the client, in accordance with your FORM data, should also be sent on a regular basis as scheduled in your service matrix.

STRATEGY AND TACTICAL MEETING

- A regularly scheduled, in-person client meeting.
- Strategy and Tactical Meetings are typically scheduled in 6-month or 12-month intervals.
- During the meeting, it is important to reinforce your panoramic approach to wealth management.
- Holding Strategy and Tactical Meetings with clients underscore the value you provide and the trajectory they are on, ensuring they face the future with anticipation not apprehension.

MOMENT OF TRUTH

- Demonstrate that you are paying attention to your client by recognizing their important life events.
- Moments of Truth recognitions are based on client FORM information.
- This is a high impact activity to enhance trust and build depth into relationships.

ANNUAL ANCHOR

- A procedure launched annually to recognize your best clients for the value you place in their trust and relationship.
- When possible select an anchor gift that reinforces your branding.
- For example, a holiday gift that you have always given to your best clients may be listed as the Annual Anchor.

SPECIAL EVENTS

- An exclusive event held to recognize the continued trust, loyalty and confidence of your best clients.
- Ask your best clients' questions around the type of events they would be interested in attending. Their voice is priceless and will ensure that your time and money is well spent on activities that they value. Examples include: sporting event, fund-raiser, dinner cruise, symphony or wine tasting.
- Use FORM information to find commonalities among your best clients.
- The intent is to provide an experience that will exceed expectations and be memorable.

THANKSGIVING CARD

- Send a quality card with an inspiring message to the AAA, AA, A, AF and B clients. Ensure the message is handwritten and the envelope is hand addressed with a holiday themed stamp.

Sample content:

"Don't judge each day by the harvest you reap but by the seeds that you plant." - Robert Louis Stevenson

I wanted to wish you and your family a joyful Thanksgiving. Also, I want to say thanks for a great relationship.

Warmest regards,

(Advisor).

By using the Thanksgiving Card, your message will arrive ahead of the pending Holiday season. The winter holiday season is a cluttered time to deliver a personal message.

BIRTHDAY CALL

- An excellent opportunity to recognize a valued AAA client on a special day.
- This high impact, time leveraged activity lets a client know that you are paying attention to them beyond just their business dealings with you.