FIRST INCOME ADVISORS

# The First Appointment Checklist and Follow-up

| | | |
|---|---|---|
| Name | | |
| Asset Size? | | |
| Coming back? | | |
| If yes, when ? | | |
| Follow-up /Prep work? | | |
| If no appt set what to do? | | |
| Do they have a broker or do it yourself? | | |
| How long/do they like? | | |
| Do they like annuities? | | |
| Do they have a survivor plan in place? | | |
| Wife/kids/grandkids | | |
| Do they have a trust? | | |
| Do they need a trust? | | |
| Estate Plan? | | |
| Can they move $? | | |
| How much can they move and are they likely? | | |
| Do they have referrals/friends? | | |
| Do they need LTC/Life? | | |
| How did they come to us? | | |
| Do they know other Clients? | | |