## STRATEGY 6: BUILD AND MANAGE YOUR PROFESSIONAL NETWORK

## Emails and Agenda for Advisor Discovery Meetings

## Template for Confirmation Email

Subject line: Confirmation for our meeting

Dear prospective network member,

It was great speaking with you today and talking about the opportunity we have to potentially work together to serve affluent clients in our area.

This email is to confirm our meeting on day, date, at time at location.

I am very interested in learning more about you and your firm as I identify the best-qualified individuals in our area for becoming part of my professional network to help serve my affluent clients.

As I mentioned in our call, the purpose of this meeting is to share with you my process for working with affluent clients and for me to gain insight into your practice and for us to get to know one another better. This is our proposed agenda:

Provide an overview of my wealth management process and how my professional network supports it

Conduct the Total Advisor Profile interview

Discuss next steps

Please bring along any marketing collateral material about your firm and yourself that will help me fully understand your business.

I am looking forward to our meeting.

Best of success,

Financial advisor's name

## Template for Advisor Discovery Meeting Agenda

**Prospective network member's name**

**Advisor Discovery Meeting Agenda**

Date of meeting

Time of meeting

1. Introduction to the meeting
2. Overview of wealth management process and ideal clients
3. Total Advisor Profile interview
4. Discussion of next steps

## Template for Follow-up Email: Invitation to Join Network

Subject line: Invitation to join my professional network

Dear prospective network member,

It was terrific meeting with you last week. I really enjoyed getting to know you and discussing how we could work together in my professional network.

Given your knowledge, experience and skill set, I think you would make a great contribution to the network in the area of professional’s area of expertise. I’d like to invite you to take part in a trial run with the other members of my network. As we discussed during our meeting, this would mean taking part in one of our regularly scheduled network meetings to discuss several client cases. Please consider this and let me know if you would like to take part.

In addition, I wanted to send to you a copy of the mind map of you and your practice that I created during out meeting. Other professionals I’ve interviewed have found their mind maps to provide a good high-level perspective on their practices and to help clarify their goals and next steps. I hope that you also find it useful in your practice.

Please get in touch with me at your earliest convenience to let me know what you decide about our trial run. I’ll follow up immediately with details on our next meeting.

I think we have a great opportunity here to serve clients extremely well while creating important opportunities for both of our businesses. I look forward to hearing from you and to the possibility of working with you in the near future.

Best of success,

Financial advisor's name

Attachment: Total Advisor Profile

## Template for Follow-up Email: No Invitation to Join Network

Subject line: Great meeting with you

Dear prospective network member,

I really appreciate your time last week in meeting with me about the possibility of joining my professional network.

As we discussed, my affluent clients have specific needs in the area of professional’s area of expertise. I’m afraid that the particular expertise you bring to the table—while clearly very valuable to your clients—would not be the optimal match for my clients’ needs.

However, I did want to send to you a copy of the mind map of you and your practice that I created during out meeting. Other professionals I’ve interviewed have found their mind maps to provide a good high-level perspective on their practices and to help clarify their goals and next steps. I hope that you also find it useful in your practice.

Thank you again for your time and for your interest in my professional network. I wish you all the best as you continue to move toward your goals as you serve your clients very well.

Best of success,

Financial advisor's name

Attachment: Total Advisor Profile