

**Taylor, Douglas J**

**From:** UptickNews **Sent:** Tue 4/14/2009 6:17 PM  
**To:** Branch-Canada; HomeOffice-Canada  
**Cc:**  
**Subject:** TODAY Is the Last Day to Opt-in to the Retirement Account Consolidation Mailer! AND Announcing the Trimester Focus Challenge Wild Card Draw Winners  
**Attachments:**

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- [Quick! Use QuickFAST Approach While Prospective Clients Are Receptive 15-Apr](#)

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**Quick! Use QuickFAST Approach While Prospective Clients Are Receptive**Investments & Services > [FAST: Financial Assessment & Solution Tools](#) (Page ID: web107088)**Quick! Use QuickFAST Approach While Prospective Clients Are Receptive**

Although the past six months have been challenging for investors, the market decline represents a real opportunity for you to contact prospective clients and use the QuickFAST approach to using FAST to turn them into clients.

A recent poll indicates that the market decline may have made more investors open to the idea of seeking a second opinion on their investments. So, while these prospective clients are receptive to hearing your solutions for their investment goals, you can use the QuickFAST approach as a launch pad for a conversation that will likely lead to a deeper analysis of their financial situation.

Financial Advisor Justin Peek of Carlsbad, CA, recently impressed an investor so much using the QuickFAST approach to At Retirement that the client transferred \$500,000 in stock to Justin's branch. Later that same day, in Justin's second QuickFAST appointment, another investor rolled over a company retirement plan worth \$150,000 and invested \$100,000 in a variable annuity (segregated fund).

Justin used the QuickFAST approach to produce a customized report in less than 10 minutes. Those initial reports resulted in his clients sharing more information about their other assets. This experience confirmed the power of starting the conversation using QuickFAST and also made Justin a believer in using FAST interactively during an appointment with the client or prospective client sitting with him.

Offering a FAST report is one way to encourage a prospective client to schedule an appointment with you. During that appointment, you can ask the prospective client a few questions that will provide you with the information to complete an At Retirement report using the QuickFAST approach. Then you can create and print an At-a-Glance Final Report (which is customized with the prospective client's name). While the report is printing, you can discuss the [Key Steps Handout](#).

Then you can discuss the At Retirement report, emphasizing their progress toward their retirement goal and/or any shortfalls in their retirement.

Financial Advisor Doug Taylor of Brampton, ON found that this approach showcases his ability to provide individual, customized solutions for prospective clients versus cookie-cutter advice, and sets the stage for follow-up calls and appointments.

"FAST has assisted me in opening the last four accounts," says Doug. "The prospects are so impressed by the quantity and quality of these reports because they make it very easy for me to present a roadmap and customized solutions for them in that very first meeting."

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Doug also says that asking the questions needed to gather the information for the QuickFAST report results in the prospective clients sharing more information than they might otherwise provide. "It allows you to map out your strategy in presenting future solutions such as pension information and life insurance," he says. "This will give you at least four or five reasons for follow-up calls to the prospective client."

Certainly, the market volatility has made investors nervous about their ability to achieve their financial goals. But again, you can use this opportunity to talk with prospective clients about the newest Strategy Report "What's in your Portfolio?"

To learn more about how your branch team can use the QuickFAST approach with prospective clients, go to the Prospecting with FAST by Mail and Phone Step-by-Step Guide.

#### Contact

- Call Financial Assessment Service at #48
- Send a Service Request to Financial Assessment Service

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