

PROBLEM

Company

- Increase types of clients to increase diversity
- Increase market share among the Greater Seattle area
- Necessity to increase the number of women in financial services

Client

- Need assistance in protecting business and families
- Prepare individuals for retirement through a diverse portfolio
- Conduct wealth accumulation in order to provide a legacy

1. FINDING PROSPECTS

- Utilize Natural Market from Recreational, Employer, and Service Experiences
- Extend market through networking with Issaquah Chamber of Commerce



2. INITIAL APPROACH

- Reach out to 30+ individuals from natural market per day
- Call one segment of Issaquah Chamber of Commerce Directory every day.

3. FACTFINDING APPOINTMENT

- Conduct a Business Owner Factfinder to identify goals for the business
- Conduct an individual Factfinder to identify current status and build rapport



CLIENT SOLUTIONS

Risk Management

Answering the most important questions for your life, an important to ensure that your goals can be accomplished and your loved ones are taken care of in the event of an untimely death or disability.

Survivor Income

What do you depend on for your income in the event of an untimely death or disability?

Source	Amount	Start Date	End Date	Notes
Spouse	\$10,000	1/1/15	12/31/15	
Retirement	\$5,000	1/1/15	12/31/15	
Disability	\$2,000	1/1/15	12/31/15	
Other	\$0	1/1/15	12/31/15	

What would you need to have to pay off?

- Mortgage: \$0
- Car Loan: \$0
- Credit Card: \$0
- Other: \$0

What assets would you need to provide for your family?

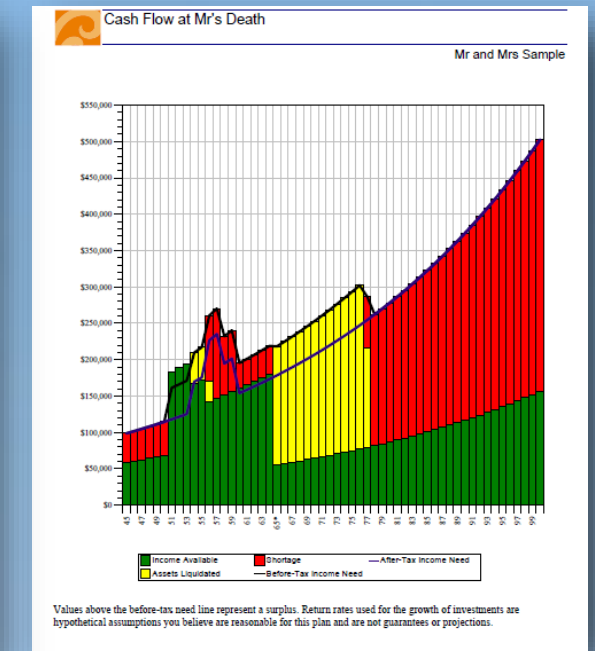
- Retirement: \$0
- Disability: \$0
- Health Care: \$0
- Education: \$0

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Identify Client Needs Based on Existing Assets, Liabilities, & Listening

Develop a plan incorporating current and future assets, and liabilities.

RECOMMENDATION

- Extend Network through joining Issaquah Chamber of Commerce**
 - Issaquah Chamber of Commerce has 500+ members
 - Managed the relationships through contacting previous employers
- Contact Business Owners and Develop a Basis of Connected Individuals**
 - Used network directory to set up meetings
 - Attended networking opportunities to contact others and keep up with competition
- Develop a shadowing opportunity for young high school women**
 - Researched business organizations in Seattle area to develop marketing plan
 - Researched computer science program working to include women as well

6. SERVICE SUPPORT

- Call back companies to check in with clients to update them
- Meet with clients to start with next step especially before birthdays



5. CLOSING

- Provide a timeline for business owners to meet needs for all employees
- Develop a plan based on ability to buy and current needs for individual clients

4. EVALUATING ALTERNATIVES

- Provide low, middle and high solutions based on client needs
- Provide alternatives based on demographics of employees



WOMEN INCLUSION

