STEPS TO A SUCCESSFUL INVESTMENT PRESENTATION

<u>Tools to have ready!</u>

Yellow Pad or Notability (digital notepad)

Ipad/smartphone device - For presentation purposes & access to turbo application

Franklin Quick Reference Guide

Two (2) Hypotheticals:

1 for Accumulation for 35 years

1 for 25 year Withdrawal Period (Retirement)

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1. Educate on Financial Concepts (Steps a-c) using Presentations (not for keynote):
    a. Bypass the middleman
        i. Illustrate How Money Works
    b. Rule of 72
    c. Dollar Cost Averaging
2. Illustrate Hypothetical **PDF**
    a. Accumulation of $7,000 for 35 years
        i. Use FKDNX
    b. Retirement Withdrawal for 25 years
        i. 4.5% annual Withdrawal w/ 4% Raise - FKINX / FKIQX
3. Discuss Roth vs. Traditional – Reference Hypo of total Account value to be taxed or be tax free

4. Complete Risk Tolerance Questionnaire w/client
5. On 1st Appointment or Carryback - Present Portfolio Recommendation.
    a. Complete Turbo Application
        i. The following will be electronically sent when processing application:

__Summary prospectuses

__Primerica Privacy Notice

__PFS Client Agreement

__CRF Form (Customer Relationship Summary - discusses fees)

__Custodial Agreement (Retirement only)

__Leaving your Employer? (Rollovers) – if applicable

Other Misc Financial Concepts:

3 Fund Accounts

Napkin Presentation

Stocks vs Mutual Funds - What is the difference

What is a Stock

What is a Mutual Fund PDF flyer

Napkin Presentation

Difference between Saving & Investing