

# 10-3-NOW CHEAT SHEET

## ☐ 1 SETTING THE SCENE



Positioning / layout of room



What would you like to get out of today?

## ☐ 2 INTRODUCTION

Do you mind if I tell you about Fitzpatrick's?

## ☐ 3 Would it be OK if I took you through a process?

<input type="checkbox"/> 4	<table border="1"> <tr> <td>NOW</td><td>WHERE</td></tr> <tr> <td>HOW</td><td>ACTION</td></tr> </table>	NOW	WHERE	HOW	ACTION
NOW	WHERE				
HOW	ACTION				

## ☐ 5 Firstly, lets get some information



## ☐ 6 NOW → 10 year context Picture & describe your life in 10 years

4 L's    



Mad



Sad



Glad



Scared

## ☐ 7 3 YEAR → Sign posts of progress



Debt reduced



Investments on track



Estate plan in order



Researched holiday house



Research charity

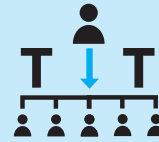


Health & fitness

## ☐ 8 Flip board over/second board.

## ☐ 9 ESTATE PLANNING - let me show you how I am set up

4m x 5% \$200,000pa / tax & protection



Testamentary  
Trust

## ☐ 10 ASSET PROTECTION



a) Asset  
Protection

b) \$ PW BR  
Personal  
Wealth



c) Gift & Loan  
Strategy

## ☐ 11 SMART FINANCIAL STRATEGIES

Total Household Income



Tax



Lifestyle



\$ Capital



→ 10 years paid off



→ \$ Build assets



→ 60 years +

## ☐ 12 CLIENT TO DO LIST



Estate Plan



Asset Protection



Debt Plan



Cash Flow



Super Strategies



Power of Attorney



Investment Planning



Insurance Gap Analysis



## ☐ 13 Sit down & look at board

## ☐ 14 Let me tell you how we can work together

## ☐ 15 SCOPE OF WORK & NEXT STEPS



Fees



Engagement agreement



Fact finder