Top Rank Advisors, Annual Review Process

Step 1 – Housekeeping – What would you like to talk about today?

Are you getting our emails?

Let's make sure your right capital is up to date, changes in income, investments?

Step 2 – Beneficiary review – Name, address, phone number, relationship, primary/contingent, %

Step 3- Risk tolerance review, do we need to send a new Riskalyze?

Step 4- Review all our services/new services offered

Step 5 – RMD review – *if needed*, this clarifies to the client where RMDs are coming from, if they are satisfied and what the withholdings are

Step 6 – Ask for referrals and tell him about our next live event and/or client event, *if applicable*