



Strategy Agenda

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| 7:00 - 8:00am | Check In / Continental Breakfast |
| 7:20 - 7:45am | Sponsor Education Session: Mobile Assistant |
| 8:00 - 8:15am | Welcome |
| 8:15 - 8:30am | Break / Classrooms Split |
| 8:30 - 10:00am | <p>Session 1 - What is your Launch Status? <i>Every great mission starts with great planning and organization. Is your ship (and your CRM) ready for takeoff?</i></p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• Working with a Style Guide• How to Handle: Contact Cleanup |
| 10:00 - 10:15am | Break |
| 10:15 - 12:00pm | <p>Session 2 - Blast Off! <i>The relationships you have with your clients and a journey to the stars have one thing in common: they all have to start somewhere!</i></p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• How to Handle: Prospecting• How to Handle: Onboarding |
| 12:00 - 1:15pm | Lunch |
| 1:15 - 2:45 pm | <p>Session 3 - Life on the Space Station <i>The life of an astronaut is one of repetition, making sure everything is being maintained properly. So too, is the life of an advisor, making sure every client is getting what they need, regularly.</i></p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• How to Handle: Client Reviews• How to Handle: RMDs |



2:45 - 3:00pm

Break

3:00 - 3:45pm

Session 4 - Making Our Space (station) Jam

The cold vastness of space can be a reminder of the special relationships we have in our lives, and why we should celebrate the people and things that mean the most!

Key Takeaways:

- How to Handle: Client Events
- How to Handle: Client Loyalty

3:45 - 4:30pm

Session 5 -To Infinity and Beyond

Every great journey comes to an end, and with the right tools and strategies, you can be a significant source of guidance for those who experience the end of their particular journeys.

Key Takeaways:

- How to Handle: Client Death
- How to Handle: Divorce

4:30 - 5:00pm

Wrap-up / Q&A