Converting Divorce Clients to Wealth Clients

First Meeting

- Conflict of Interest Disclosure
- Opportunity to educate

Current Situation

- Notice Investments
- Current situation
- Broad financial situation
- Investment experience
- Estate planning
- Wills

Identify Needs

- Income
- Basics
- Support
- Planning
- Taxes

End Divorce Case

- Summary of Meetings
- Document Prep
- Trial
- Process Failure

Prospect

- Follow up frequently
- Invite to workshops
- Send a recovery gift

Initial Meeting After

- Establish To-do List
- Start any transfers
- New Account Set-up
- Budget
- 12-month plan