

RMS™ WORKSHOP STRATEGY WORKSHEET

Date of meeting: 3/10/13 Who (initials): DSZ
 Advisors name: Russell/Hicki Firm: _____
 Work: _____ Cell: _____ Other contact: _____
 Workshop date: _____ Time: _____ Place: _____
 Topic: _____ Attendance goal: _____
 Is Advisor speaking? Yes No Topic: _____ Duration: _____
 Specific refreshments requested? Yes No Description: Panera Breakfast
 Firm Fee commitment Amount: \$ 4000 Advisor Fee Commitment \$ _____
 Description: Panera Breakfast 8:30

GOALS (must be measurable)

ADVISOR: 3rd Party Credits → of Part and Plan...
 LAW Firm: Clear Communication + strategy
 Three things to share with attendees about the advisor: ^{used breakfast}
 1. Breadth of experience - Team Russell/Hicki (Financial Consultants)
 2. Mgmt vs Product Consultative / Relationship TEAM
 3. _____

TASK LIST

ADVISOR	DATE
<u>Advice advisor of setting expectations abt timing</u>	<u>3/15</u>
<u>Breakfast. Set up</u>	<u>ASAP</u>
<u>Final confirm list by 3/14 3/14</u>	<u>3/14</u>

Next meeting: _____ Who: _____ Date: _____
 Objective: _____

FIRM NOTES:
Re: MPM Recontact to Russell + Copy Hicki - create process post info
(1) email after Mtg for Atty (2) ^{advisor file}
(2) The info of advisors who get
least ~~best~~ process + DSZ to
re cap expense - 90 days ⁷⁴
 + get advisor on each referral -
 ↳ Before 3/18
 STRATEGY MTG on SLI presentation