F.O.R.M.

Advocate Service Matrix

	CORE SERVICE ACTIVITIES				TIME OF YEAR & OTHER VALUE ADDED SERVICES											
CLIENT CLASS	**S&T*** REVIEW MEETING**	**FEO** & UPDATING**	**CALL ROTATION**	**MOMENT* OF TRUTH**	**ARTICLES OF INTEREST**	**THANKS-GIVING Letter**	**XMAS CARD**	**WEDDING ANN-IVERSARY CARD**	**BIRTHDAY CARD**	**BIRTHDAY CALLS/BB**	**SOUNDING BOARD**	**ANNUAL ANCHOR**	**SPECIAL EVENTS**	**ADVOCATE DINNER**	**WELCOME PACKAGE**	**eNEWSLETTER**
AAA *Assets, Attitude & Advocate*	Annual -1 FA	Annual -1 FA	Quarterly - 4 FA	As Needed - 1 FA	At least 2/yr As Needed/FA	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST FA lottery ticket	Annual - 1 FA	Quarterly - 4 FA	Annual -1 FA Pie?	Annual -1 FA/FSA	Annual - 1 FA/FSA Not done now…maybe after lockdown in future	One-Time CST Ideas for package in Pareto Academy	Monthly - 12 FSA
AA *Assets & Attitude*	Annual -1 FA	Annual FA	Quarterly - 4 FA	As Needed - 1 FA	At least 2/yr As Needed/FA	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST FA lottery ticket	Annual -1 FA	Quarterly - 4 FA	Annual -1 FA	Annual -1 FA/FSA		One-Time CST	Monthly - 12 FSA
A *Assets ($500,000+)*	Annual -1 FA	Annual FA	Quarterly - 4 FA	As Needed - 1 FA	At least 2/yr As Needed/FA	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST FA lottery ticket	Annual -1 FA	Quarterly - 4 FA	Annual -1 FA	Annual -1 FA/FSA		One-Time CST	Monthly - 12 FSA
PC *Package Client - On going revenue $1000-$3000/year*	Annual -1 FA	Annual FA	Quarterly - 4 FA	As Needed - 1 FA	At least 2/yr As Needed/FA	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST FA lottery ticket	Annual -1 FA	Quarterly - 4 FA		Annual -1 FA/FSA		One-Time CST	Monthly - 12 FSA
EA *Emerging A (within 2 years)*	Annual -1 FA		Quarterly - 4 FA	As Needed - 1 FA	At least 2/yr As Needed/FA	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 FA	Quarterly - 4 FA		Annual -1 FA/FSA		One-Time CST	Monthly - 12 FSA
AF *Family member of A Client*	Annual -1 FA		Quarterly - 4 FA			Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST		Quarterly - 4 FA		**Webcast?**		One-Time CST	Monthly - 12 FSA
B *$300,000 – 499,000*	Annual -1 FA		Quarterly - 4 FA			Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 CST	Annual -1 FA	Quarterly - 4 FA		Wine Tasting/ Local Authors		One-Time CST	Monthly - 12 FSA
C *$100,000 – $299,000*	Annual * 1 New FA		Annual -1 New FA			Annual -1 CST	Annual -1 CST		Annual -1 CST	Annual -1 New FA	Annual -1 New FA		Musicians Lawyer - Estate Planning for Pets		One-Time CST	Monthly - 12 FSA
D *Under $100,000*	Annual ** 1 New FA		Annual -1 New FA			Annual -1 CST	Annual -1 CST		Annual -1 CST	Annual -1 New FA	Annual -1 New FA		Cooking/ Meal Box with lesson		One-Time CST	Monthly - 12 FSA

* These annual reviews may be conducted by telephone to streamline them if permitted by compliance

** These annual reviews may be conducted by mail to streamline them if permitted by compliance.

*** Strategy and Tactical

**** Family Estate Organizer

* Moment of Truth - Important moment in the client's life

eNewsletter to cover every service type at least once per year (Financial, Home and Auto, Taxes, Estate Planning, ect.)

)ifferent welcome packages for different level clients

Enroll to client portal

Coffee table book about us

Walden Company example

Other Ideas: Instead of wine, customize corkscrew w/ client name on it.

ADVOCATE SERVICES

ANNUAL ANCHOR SAMPLES

A Unique Greeting Card - Consider using www.lavishcards.com
High Quality Photo Art Wall Calendar (Handwrite client birthday greetings on the calendar for that extra personal touch)
Bottle of Wine that is aged for 10 years or more – enclose with a tag that reads, "Turn me once every 6 months."
High Quality Wine Glasses (ideally engraved) https://www.gifttree.com/
Hanging Basket – use a local nursery
Potted flowers to welcome the season
Free Yard Service in fall or spring – Make arrangements through a local yard service company
Personalized Gift Basket: https://www.gifttree.com/
Annual tickets to a local music, sports or festival: https://www.stubhub.com/
Seasonal treats:

- Ceramic pie plate and knife with a pie for the season
- Seasonal candy or chocolate in a dish: https://www.gifttree.com/
- Tins of specialty cookies: http://www.byrdcookiecompany.com/
- Local jams or syrups

Beautiful blankets for colder climates
Technology such as portable cell phone chargers, Bluetooth speaker or other innovative gifts: https://www.e-corporategifts.com/techies.html
Engraved Cutting Board
Knife Set
Embroidered Towel

Events

	Golf Outing
	Rent RV for Tailgate at a Game
	Glass blowing Class
	Cooking Class
	Volunteer opportunites
	Gift boxes
	Rent a movie theater (starting at $99). Might be a cool idea once a quarter for some of the clients who refer people to us the most. Especially if a feel good type movie comes out.
	Car Show
Grand Rapids	Cooking Classes and Dinner
Grand Rapids	Wine tasting venue that would be available anytime and is a first class wine cellar
Grand Rapids	Candle Making that people around here have enjoyed. Available anytime, variable cost, 15 or

	RDJ	
	RDJ	
	RDJ	
	RDJ	
	RDJ	
https://www.oliveandcocoa.com	RDJ	
	Darci	email 1/27
	Nick	
https://thelocalepicurean.com/pages/class	John Walendowski	
http://www.notosoldworld.com/	John Walendowski	
https://www.waxpoeticcandlebar.com/	John Walendowski	

CLIENT CLASSIFICATION

ASSETS	
A Client	$500,000+
B Client	$300,000 – 499,000
C Client	$100,000 – $299,000
D Client	Under $100,000
ATTITUDE	
A	Great Attitude
B	Good Attitude
C	Bad Attitude
D	Has an issue with the representative or FSA
ADVOCATE	
A	Received a referral within the last 24 months
B	Received a referral after 24 months
C	Never received a referral
D	Has an issue with the representative or FSA
OTHER	
AF	Family member of A Client
EA	Emerging A (within 2 years)
PC	Package Client- On going revenue $1000-$3000 / year
A	Assets
AA	Assets and Attitude
AAA	Assets, Attitude and Advocate