TruChoice FINANCIAL GROUP, LLC

The Poterack Process

AGENDA

March 20TH - March 21ST, 2019

WEDNESDAY, MARCH 20TH

Noon - 1:00 PM	**Welcome Lunch** Location: Hampton Inn & Suites Charlotte/Southpark at Phillips Place Cooper Room 6700 Phillips Place Court Charlotte, NC 28210
1:00 PM - 2:00 PM	**Revamp your New Client Acquistion Process** • Improve your Question game and the Answers will be easy! • Are you selling YOU or are you selling products? • You're like everyone else, until you're not. Courage to be different pays off!
2:00 - 3:00 PM	**Train your future clients to respect your time; The Poterack Process can be yours!** • Discipline and professional protocols. • The importance of a consistent process; Sell the Value of YOU! • Learn how our "Initial Case Analysis" & "Project Fee" exploded results!
3:00 PM - 4:00 PM	**Be different in how you communicate with prospects and clients. Outcomes > Products** • IRA Exit Strategy & Tax-efficient Allocation with 3 Types of Money (in IRS code). • Prospective Client Bias Exercise will eliminate "I want to think about it". • Use technology to tell your story. We'll share how we use planning tools.
4:00 PM - 5:00 PM	**Bottom Line vs. Top Line** • FMOs, BDs, and Marketing firms push top line; You spend bottom line!
5:30 PM	**Cocktails with Dinner Provided**

THURSDAY, MARCH 21ST

7:30 AM - 8:30 AM	**Breakfast Provided** Location: Hampton Inn & Suites Charlotte/Southpark at Phillips Place Cooper Room 6700 Phillips Place Court Charlotte, NC 28210
8:30 AM - 10:00 AM	**Revenue Generation: We Share our Lead Funnels with you!** • Proven events, profitable strategies, and marketing you can use. • Monetize your support staff so you're viewed as an investment not an expense. • How you can build a business people want to buy! (Not a list of customers)
10:00 AM - 11:00 AM	**Questions and Review**
	Optional Live events you may attend (populated with zero mailing costs!)
Noon - 1:00 PM	• Ladies Luncheon (lunch provided)
6:00 PM - 7:00 PM	• Nibbles & Knowledge (dinner provided)