thrive FINANCIAL SERVICES

thrive CAPITAL MANAGEMENT, LLC

VALUE ADDED SERVICES

Appointment Tools & Processes (3-Steps)

- Appointment Correspondence Process (letters, agendas, etc.)
- My Opportunities Appointment Process
- Appointment Process Outline
- Financial Freedom Workbook
- Understanding Financial Advice Presentation
- Positioning How You Work as an Advisor Script
- About Us Brochure
- Personalized Coffee Table Book
- My Point of View Client Workbook
- Personalized Reports
  Prepared by Case Central
- Allocation & Diversification Presentation
- Schedule of Fees
- "How I Get Paid" Script
- Life Events Tools

Training

- Fast-Start Affiliate program
- Access to Featured Advisors
- Mew Business Process Training
- Personalized Portfolio & Presentation Training
- Monthly Webinar Trainings and Library
- Investment Advisory Success Webinar Series
- Article Library
- Advanced Advisor University
- AUM Academy
- Objection Handler Training
- How to Handle Customer Complaints

Practice Management & Support Services

- Financial Planning Services
- Online Performance Reporting (Navigator)
- Portfolio Analysis Review Service
  Includes Morningstar Reports
- The Value of and Advisory Practice
- Guide to Transitioning Firms
- Appointment Process Video
- Transition Checklists
- Pre-populated Change of Firm Paperwork
- Client/Prospect Notification Letter
- Client/Prospect Introduction Script

Prospecting

- The Rule of 100 Sales System
- Retirement X-Ray Sales System
- Social Security Sales System
- Financial Pyramid Sales System
- IRA Legacy & Planning Sales System
- Empowering Women Sales System
- SawBlade Sales System
- Color of Money Sales System
- Personal Market Recovery System
- Is Gold Worth the Risk? System
- $10 million Plan Package
- Personalized Marketing Action Plan
- Financially Tuned Radio Program