



MAKING THE ASK

NEW WAYS TO MAKE THE SALE





CHART YOUR PATH

**TIMELINE
WITH
MILESTONES**

**RESEARCH &
PROSPECT**





ADVANCE WORK

RESEARCH

LOOK FOR HIDDEN
GEMS

DON'T COME IN COLD

ASK & LISTEN



CHART YOUR PATH

**TIMELINE
WITH
MILESTONES**

**RESEARCH &
PROSPECT**

**PARTNER
CENTRIC
APPROACH**





IN THE ROOM

KNOW YOUR ASK

KNOW YOUR SECOND ASK

**UNDERSTAND THE
BENEFITS**

BE AN ACTIVE LISTENER

A PATH TO SUCCESS



**FOCUS ON THE
MISSION**

**UTILIZE YOUR
NETWORKS**

**TRACK YOUR
MILESTONES**



MOBILIZING PEERS IN THE HIGH WEALTH MARKET

