

## Finals presentation checklist

Use the following checklist as a guide for your finals presentation meetings.

Task	Yes	No
<b>Before the meeting</b>		
Develop a meeting agenda and send to prospect. <i>Benefit: Demonstrates your commitment to following a process.</i>		
Order samples of educational materials for use at the meeting. <i>Benefit: Shows that you are ready to engage with employees/plan participants in a meaningful way.</i>		
Prepare a Service summary, Education Policy Statement and Planning calendar. <i>Benefit: Allows prospects to envision the experience of working with you in detail.</i>		
Review all notes from previous meetings, calls, emails to make sure that you are prepared to address all issues that could be raised by your prospect. Refer to these notes before you finalize and send out the meeting agenda. <i>Benefit: Makes it clear that you listen and respond to client concerns and take a customized approach to delivery.</i>		
<b>At the meeting</b>		
Leave time for questions/discussion after presentation. <i>Benefit: Addresses any objections and, if necessary, allows time to coordinate solutions with other service providers.</i>		
If you are presenting with representatives from other service providers, have you rehearsed together or conducted a "dry run" by having a pre-meeting conference call? <i>Benefit: Instills confidence that you can assist the Plan Sponsor in coordinating everyone's contribution to the plan.</i>		
<b>After the meeting</b>		
Send an email followed by a handwritten note indicating your gratitude for being asked to present. <i>Benefit: Shows that your commitment is serious.</i>		
Promptly follow up with responses to any outstanding items brought up at the meeting. <i>Benefit: Showcases your commitment to service.</i>		

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