WORKBOOK

ANNUAL REVIEW REVAMP

SESSION 2

BILLION DOLLAR BROKER

ACCELERATOR

Welcome to the Annual Review Revamp

SESSION 2

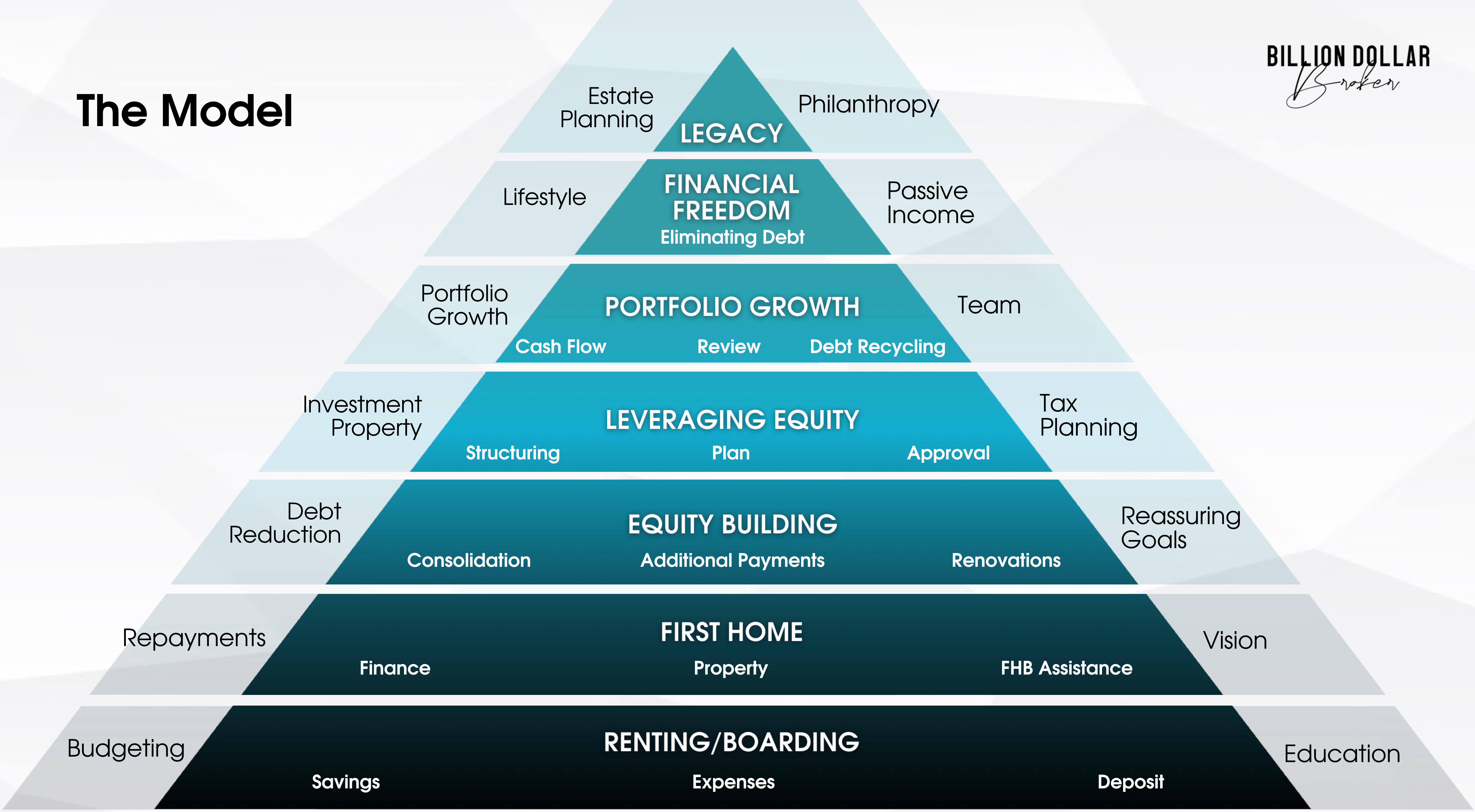
- Recap on the Annual Review
- The Tactics
- Scripts and Templates
- Actions

Segment 1

RECAP ON THE ANNUAL REVIEW

1

The Model



Estate Planning
LEGACY
Philanthropy
Lifestyle
FINANCIAL FREEDOM
Eliminating Debt
Passive Income
Portfolio Growth
PORTFOLIO GROWTH
Team
Cash Flow
Review
Debt Recycling
Investment Property
LEVERAGING EQUITY
Tax Planning
Structuring
Plan
Approval
Debt Reduction
EQUITY BUILDING
Reassuring Goals
Consolidation
Additional Payments
Renovations
Repayments
FIRST HOME
Vision
Finance
Property
FHB Assistance
Budgeting
RENTING/BOARDING
Education
Savings
Expenses
Deposit

NOTES

Segment 2

THE TACTICS

2

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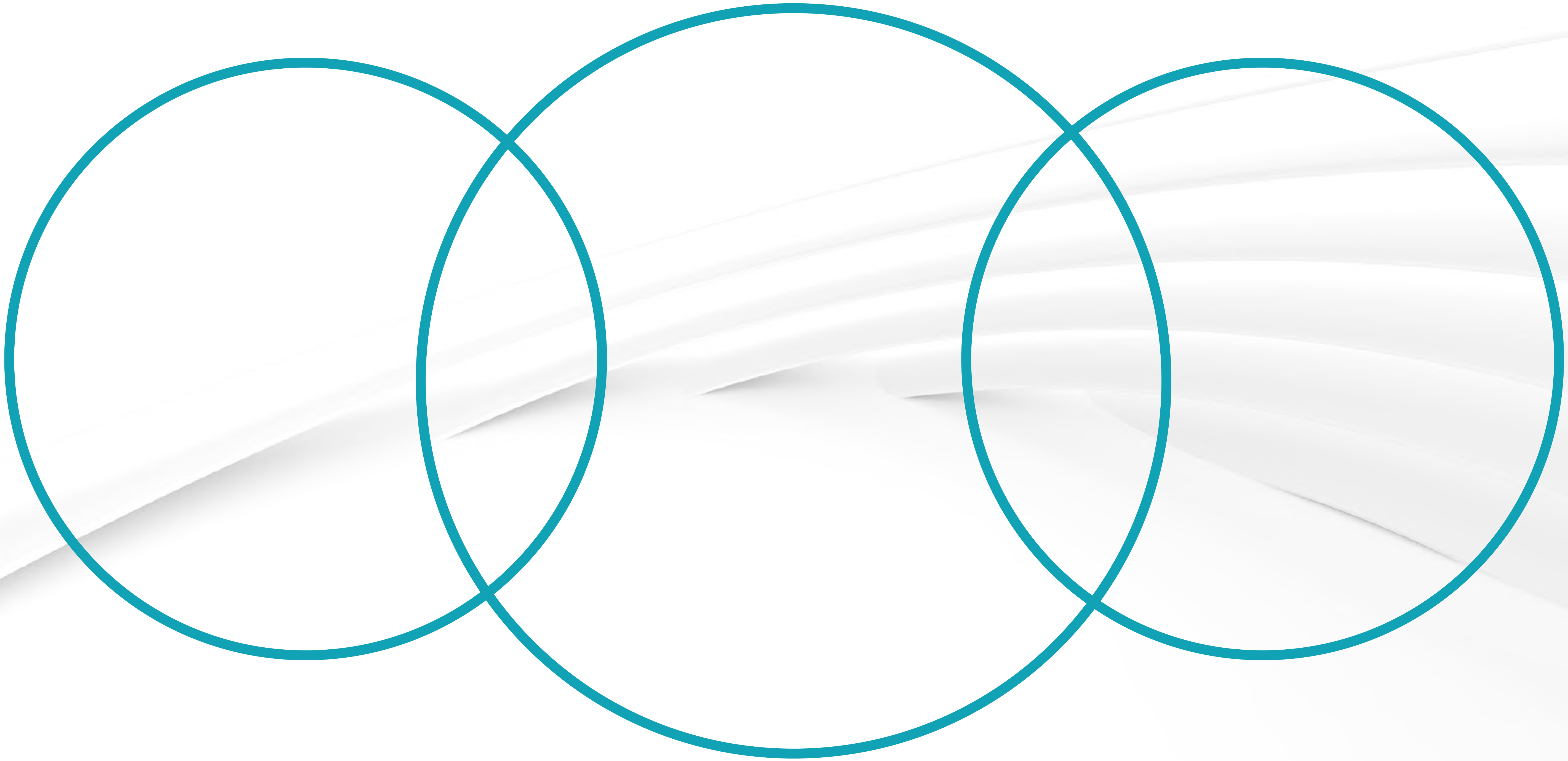
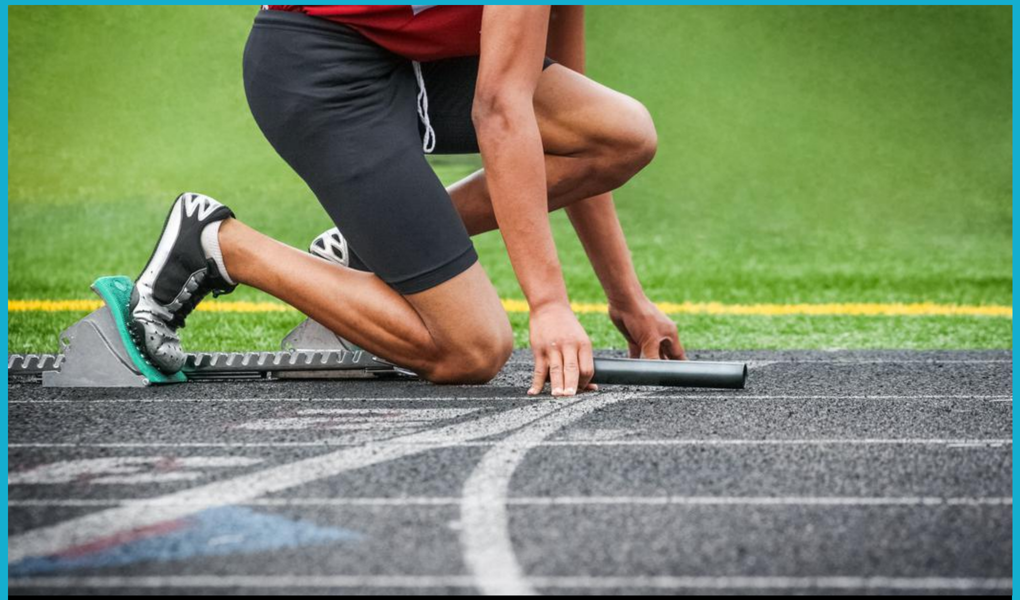
Annual Review Preparation Model



Annual Review Model

BILLION DOLLAR Broker

01



PREPARATION

Prepare and get all tools and info ready

02

EXECUTE

Make contact and complete the Annual Review

03

FOLLOW UP

Complete any follow up actions and book the next review

Annual Review Audit

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	Preparation	Execute	Follow Up
BRONZE	Targeting	Make the calls	Do pricing
	Basic Script	Explain next steps	Confirm acceptance
	Schedule Time	Pricing	Ensure pricing applied
SILVER	Email Templates for nurture	Formal review process	Email summary
	Google form questionnaire	Create plan for clients	Book Loan appointment
	Pricing in advance	Challenge and educate	Next review booked in
PLATINUM	Video explaining value	Property portfolio review	Email recommendations
	Calendly set up	Reconfirm goals & progress	Action outcomes
	Portfolio document updated	Explore opportunities	Connect with referral partners

Segment 3

STEP 1: PREPARATION

3

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Annual Review Model

01

PREPARATION

Prepare and get all tools and info ready

02

EXECUTE

Make contact and complete the Annual Review

03

FOLLOW UP

Complete any follow up actions and book the next review

Annual Review Appointment Phone Script

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Greet and Rapport

- Hi, is that xxxxx? Ok Great,
- It's Ross calling from Aussie Parramatta, how are you today?
- Have I caught you at a good time? OK great.
- We recently sent you an email in regards to your loan anniversary.

Check in for value

- How does that sound?
- Great!

Statements not sent back

- It's been X Years since your loan settled.
- We want to ensure that your lender is still looking after you and your loan is competitive.
- Did you want us to review it for you?

Statements sent back

- Good news, we have been able to negotiate a better rate for you with your lender.
- To have it applied, we just need to book in a short call to review your situation which will only take approximately 10 minutes to run through everything?

Book and close

- Book time in diary
- Send email confirming time etc.
- Thank Client, we look forward to discussing this with you xxxx

Book and close

- Great, Let's Book time in diary, we will send email confirmation etc
- Thank Client, we look forward to discussing this with you xxxx.

Annual Review Positioning Email

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Hi First name,

It's been X Years since your loan settled. We want to ensure that your lender is still looking after you and your loan is competitive. Did you want us to review it for you?

To kick-start this process, please provide us with a copy of your recent loan statement/s.

Any questions, get in touch, Otherwise, we will be in touch in the coming days to discuss the next steps.

Kind regards,
XXX

Annual Review Implementation Plan – Prepare Stage

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Area	Steps	Next Action	By who	When
Targeting and CRM	• Annual review dates in CRM • Weekly/Monthly list created			
Scripts and communication tools	• Compile phone script with key outcome • Nurture email/SMS • Annual review questionnaire • Pricing guide per lender			
Updating client info	• Request statement from clients • Call lender to get updated rates, products • Complete property valuation or RP data report • Update property portfolio sheet (if applicable)			

NOTES

Segment 4

STEP 2: EXECUTE

4

Annual Review Model

01

PREPARATION

Prepare and get all tools and info ready

02

EXECUTE

Make contact and complete the Annual Review

03

FOLLOW UP

Complete any follow up actions and book the next review

The Annual Review Appointment Framework

Set The Frame

- ✓ Build Rapport
- ✓ Outline Agenda

Clarify Goals

- ✓ Understand clients situation
- ✓ Review values, rates, loan terms, IO/Fixed expiry, available equity, maximum borrowing amount, restructuring options
- ✓ NEADs (Now, Enjoy, Alter, Decision, Solution)

Challenge and Educate

- ✓ Debt reduction, wealth creation and lifestyle
- ✓ Models, graphs, calculator
- ✓ Share stories

Solution

- ✓ Present pricing
- ✓ Discuss alternate structures
- ✓ Agree on next steps

Next Steps

- ✓ NEW LENDING / VARIATION REQUIRED
- ✓ Is a full appointment required?
- ✓ What documents do we need from them?
- ✓ What forms do we need completed?

Close

- ✓ Next steps
- ✓ Date, time and reason for next contact
- ✓ Handover to team (if applicable)
- ✓ Ensure pricing applied (diarise)

Annual Review Implementation Plan – Execute Stage

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Area	Steps	Next Action	By who	When
Client contact	• Call assignee • Time blocked in calendar to make calls • Make the calls using the script • Explain next steps • Book in client annual review (Calendly, outlook)			
Confirmation and nurture	• Booking confirmation email/SMS • Reminders emails/SMS • Request any outstanding client info			
The appointment	• Review values and available equity • Review loan rates, terms and expiry dates • Discuss restructuring options and max borrowing amount • Reconfirm goals and progress • Warm introduction to referral partners • Update property portfolio sheet (if applicable)			

NOTES

Segment 5

STEP 3: FOLLOW UP

5

BILLION DOLLAR Broker

Annual Review Model

01

PREPARATION

Prepare and get all tools and info ready

02

EXECUTE

Make contact and complete the Annual Review

03

FOLLOW UP

Complete any follow up actions and book the next review

Annual Review Implementation Plan – Follow Up

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Area	Steps	Next Action	By who	When
Pricing	• Pricing request complete • Confirm acceptance with client • Ensure lender applies pricing			
Re-confirmation of goals	• Book loan appointment if required • Book in next review • Email any recommendations/ restructuring			
Complete actions	• Complete any actions from the review • Loan restructuring, property valuations etc • Connect with referral partners (if applicable) • Google review			

NOTES

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Segment 6

RECAP AND ACTIONS

6

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Actions for the week

- Complete your annual review
- Share your progress in skool
- Bring your annual review to next weeks session

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