WORKBOOK

ANNUAL REVIEW REVAMP

BILLION DOLLAR BROKER

ACCELERATOR

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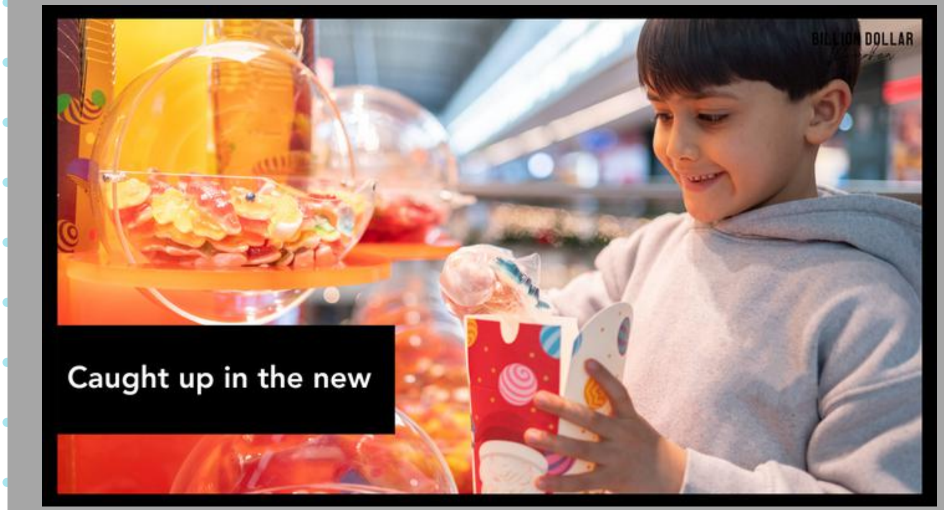
Welcome to the Annual Review Revamp

- Annual Review Model
- Adding Value
- Annual Review Audit
- Annual Review Template
- Your Process

NOTES



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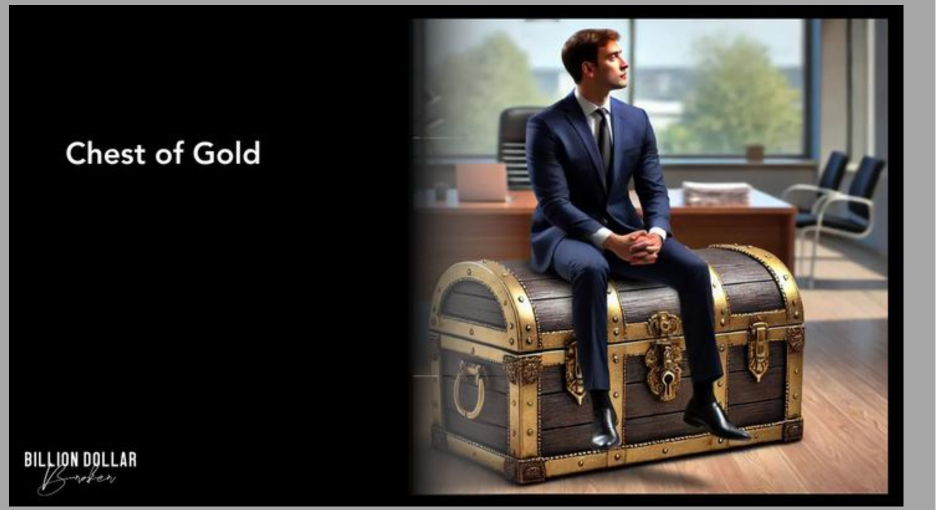

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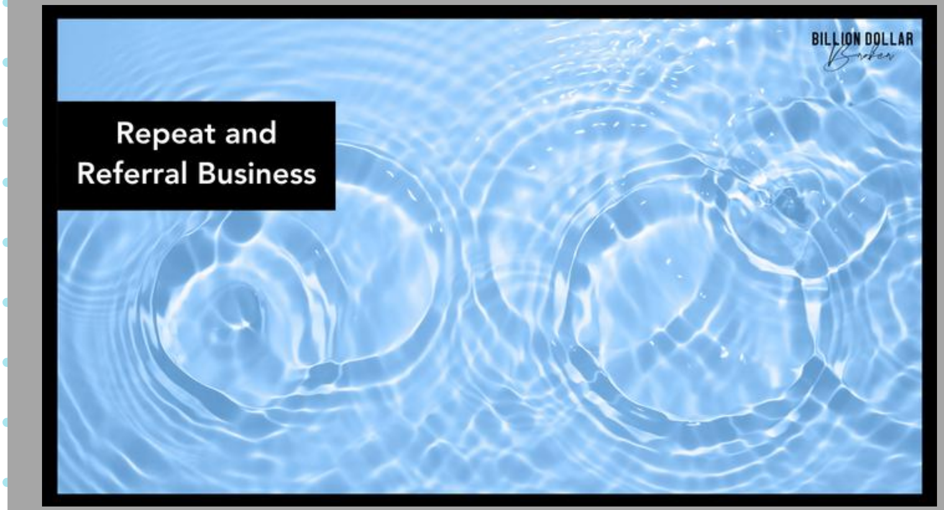
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Repeat and
Referral Business


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Loyal Clients

NOTES

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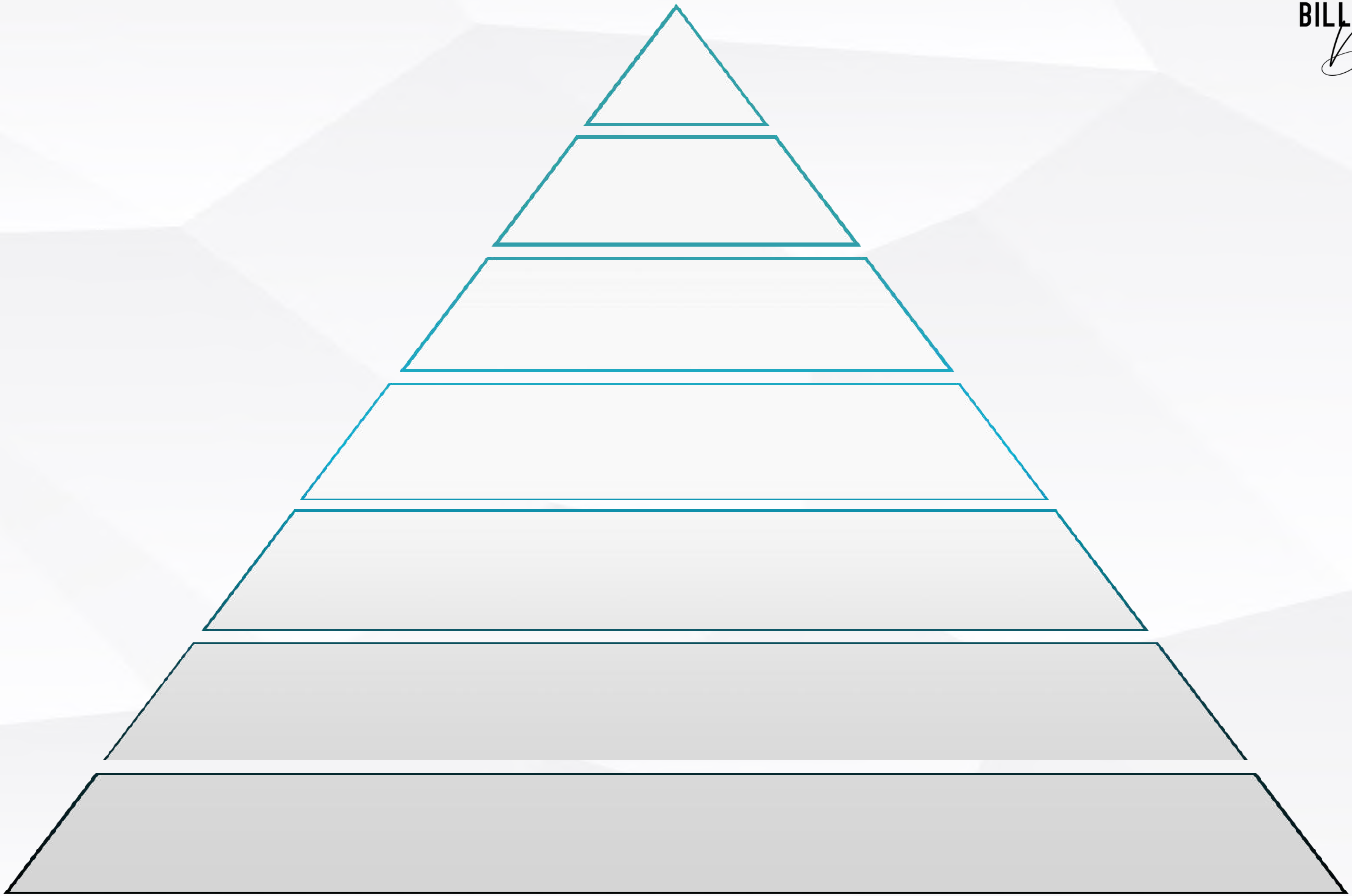
NEED THE RIGHT WORDS TO UNLOCK SALES"
BILLION DOLLAR


Seamless Process

Segment 3

THE MODEL



Lifetime value of a client

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Timeframe 5 years	Referral (one loan per year) 5 loans	Average Income per loan $3,500	Total value $17,500
No. of Loyal Clients in loan book 400	Total dollar value $7,000,000	Annual cashflow $1,400,000	Monthly cashflow $116,000

Close the gap

What are some ways you can add value to clients in the following areas?

Equity Building	Leveraging Equity	Portfolio Growth

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

Annual Review Checklist

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Preparation	Execute	Follow Up
Annual Review Dates in CRM	Make the calls	Pricing complete
Weekly/Monthly list created	Explain next steps	Confirm acceptance
Schedule time in calendar	Annual Review Process	Ensure pricing applied
Script with key outcomes	Review • Values • Rates • Loan terms • IO/Fixed expiry • Available equity • Maximum borrowing amount • Restructuring options	Email summary
Nurture email/SMS requesting statement for loan details	Reconfirm goals & progress	Book Loan appointment
Call lender to get updated rates and product details including balance	Warm introductions to client's team (accountant etc.)	Next review booked in
Pricing guide per lender	Request Pricing/Loan restructure	Email recommendations
Property valuation or RP Data report complete		Action outcomes
Property Portfolio sheet updated		Connect with referral partners

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Bronze

1. Clients loan anniversary flagged in database
2. (EMAIL) Annual review positioning
3. (Make the call) Annual review appointment script
4. Statements followed up & received
5. Ensure pricing applied
6. Book in next year's review

Silver and Platinum Process

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1. Clients loan anniversary flagged in database
2. Annual review nurture emails
3. Pricing completed in advance Annual review appointment script
4. Appointment booked
5. Annual review appointment
6. Application Required

If YES
Loan Process

if NO
Email summary or plan and book in next review

YOUR TURN!

Write your own process in the boxes below

The Annual Review Appointment Framework

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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)

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