TIFIN **Plan**

Great Relationships Start with a Conversation, Not a Questionnaire

As a financial advisor, you need more impactful ways to engage with prospects beyond a generic questionnaire.

In order to do that, you need to make magic from the very first interaction.

The problem is, the old way of engaging qualified prospects is broken:

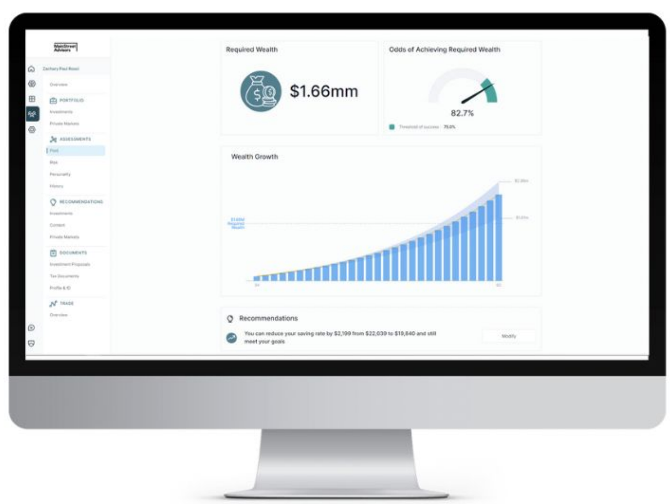
- Clunky websites with hard to find contact information
- Awkward introductory calls to screen for qualified prospects
- Long, boring questionnaires that clients hate

This could lead to missing out on qualified clients, wasting time talking to the wrong investors, and delivering a poor client experience to prospects.

At TIFIN Wealth, we believe every relationship should start with a valuable conversation, not a boring questionnaire. And you shouldn't have to waste time filtering out unqualified clients.

We understand and don't just care about the advisors we work with – we care about your end-clients too.

That's why we help financial advisors engage more clients with immediate value through simple, conversational microplans powered by TIFIN Plan.



Greet Every Prospect with a Conversation

Here's how microplans can work for you:

1) Email a microplan link to your prospects on a topic that addresses a key financial concern
2) They complete the short microplan
3) You can immediately determine if they qualify and move to solving the problem addressed within the microplan

Start winning more qualified clients by prospecting through our 15+ microplanning modules.

Learn more at **TIFINwealth.com/plan**