|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Activity** | **Person Responsible** | **Completed on:** |
| **Confirm Your Introduction Kit Supplies are Available** |
| Introduction Kit Folders  |  |  |
| Business Cards |  |  |
| Quality Letterhead/Paper |  |  |
| **Update or Create Your Introduction Kit Contents** |
| Book Photographer (if required for team photos) |  |  |
| Kit 1 Quality Card for Handwritten Message |  |  |
| Kit 2 Prospective Cover Letter Customized  |  |  |
| Kit 3 Introduction to Team Customized |  |  |
| Kit 4 Advisor Biographies Completed |  |  |
| Kit 5 Our Partnership with You |  |  |
| Kit 6 Our Partnership with [Firm] |  |  |
| Kit 7 Our Approach to Financial Planning |  |  |
| Are there other suitable inclusions for your kit? |  |  |
| **Have all Content Compliance Approved** |
| All content is compliance approved |  |  |
| Ensure it is print-ready (formatting) |  |  |
| **Introduction Kit Assembly** |
| Pre-assemble 10-12 Introduction Kits |  |  |
| Customize Cover Letter as Required (Real Time) |  |  |
| Add Handwritten Note as Required (Real Time) |  |  |
| Handwrite Address & Courier (Real Time) |  |  |

Introduction Kit Checklist