

Relationship Development

<u>Prospect</u>	<u>Platinum Client</u>	<u>Silver Client</u>	<u>Gold Client</u>
<ul style="list-style-type: none">• Quarter 1<ul style="list-style-type: none">– Book• Quarter 2<ul style="list-style-type: none">– Call/Quote– Video• Quarter 3<ul style="list-style-type: none">– Article– Podcast• Quarter 4<ul style="list-style-type: none">– Call/Quote	<ul style="list-style-type: none">• Quarter 1<ul style="list-style-type: none">– Book– Article• Quarter 2<ul style="list-style-type: none">– Call/Quote– Video• Quarter 3<ul style="list-style-type: none">– Book– Call/Quote• Quarter 4<ul style="list-style-type: none">– Video– Annual Review	<ul style="list-style-type: none">• Quarter 1<ul style="list-style-type: none">– Book• Quarter 2<ul style="list-style-type: none">– Call Quote• Quarter 3<ul style="list-style-type: none">– Article• Quarter 4<ul style="list-style-type: none">– Call/Quote	<ul style="list-style-type: none">• Quarter 1<ul style="list-style-type: none">– Book• Quarter 2<ul style="list-style-type: none">– Article• Quarter 3<ul style="list-style-type: none">– Podcast• Quarter 4<ul style="list-style-type: none">– Call/Quote