

LIFEPlan

Planning and Realizing
Your Projects

The LIFEPlan Approach, Step by Step

From the first meeting to the implementation of recommendations.

- A simple way to get a first meeting
- A clear structure for the first meeting
(information gathering through Interview mode)
- A structured second meeting
(plan delivery and decision-making)
- An action plan to implement insurance and investment recommendations

What the Approach Solves, in Practical Terms.

The Core Idea

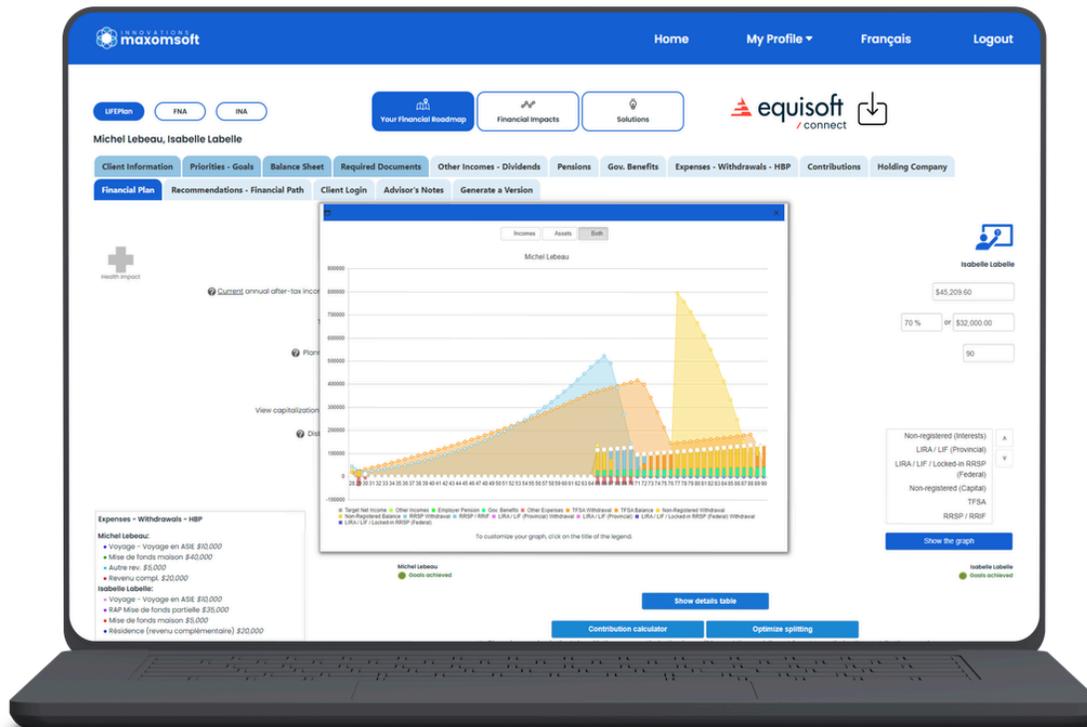
You offer a complete financial plan to demonstrate the value of your services, and then the person decides whether they want to move forward with you.

Why It Works?

- The person is looking for clarity first, not a product.
- The process is structured and reassuring.
- Information gathering is guided in LIFEPlan through Interview mode, with step-by-step navigation.

What the LIFEPlan System Supports in the Process

LIFEPlan helps you structure the information-gathering process and build a clear plan based on consistent information, in order to support decision-making.



The Invitation Message (Securing the Meeting)

Message

"To help you see the value of my services, I'd like to offer you a complete financial plan focused on what matters most to you – including retirement and the strategies to put in place.

From there, you can decide, with no pressure, whether you'd like to move forward together."

"If that sounds good to you, would this week or next week work for a meeting?"

"If yes, I'll send you the list of documents to prepare."

Short Version

"I'd like to suggest a simple process: meeting 1 (information gathering), meeting 2 (plan + decisions). Would this week or next week work for you?"

Note

This LIFEPlan approach works just as well over the phone as it does in person.



Pre-Qualification

Objective

Screen out “tourists” and keep prospects who genuinely want to move forward.

4 Simple Questions

- What is your priority: retirement, protection, investments, or business planning?
- On a scale of 10, how important is it for you to address this this year?
- Are you comfortable gathering a few documents before the meeting?
- Perfect. Would you prefer this week or next week?



Green Light

- Clear need + realistic timeline + collaboration



Yellow Light

- Unclear need / no availability / no documents
- In that case, you can offer a shorter scoping meeting first, then schedule the full information-gathering meeting afterward.



Documents to Prepare

You Can Paste This Into Your Email

"In preparation for our next meeting, I will need certain information so I can properly assess and process your file."

List

- [Federal Notice of Assessment*](#)
- [TFSA contribution room*](#)
- Tax returns for the past two years (federal and provincial)
- Statements for registered and non-registered investments
- [CPP*](#) or [QPP*](#) statement of contributions
- Pension plan statement
- Mortgage statement
- Insurance contracts (life, disability, critical illness, loans)
- Group insurance (your coverage booklet)
- If you own a corporation: financial statements, shareholders' agreement, investment statements

*Click the links to access the various government services.

How to Use Interview Mode

What You Present to the Client

“For information gathering, I’m going to use an interview mode.”

“It helps me structure the information-gathering process and make sure nothing is missed.”

“We’ll go step by step, and then I’ll summarize what I’m taking away and what’s still missing to finalize your plan.”

Building Trust

Before talking about numbers, the first section of Interview mode deserves your full attention: the client’s priorities and goals. LIFEPlan is, above all, an action plan. When this step is done well, the client naturally moves from the cognitive level (facts, numbers) to the emotional level (what truly matters). And that’s normal: behind a goal, there is often an emotion – security, freedom, pride, relief, peace of mind.

Your role here is not to fill in boxes quickly, but to create a space where the person feels understood. By asking an open-ended question, rephrasing in your own words, and showing genuine listening, you help the client clarify what they want to experience, and why.

This is often the moment when trust begins to take hold, simply because you are seeking to understand first.

Key Points for You

- Interview mode structures the discussion and helps prevent omissions.
- Missing information is turned into an action list to complete, and a report is automatically sent to you and your client.
- If the client asks, the system is hosted in Canada on the Microsoft Azure cloud. LIFEPlan provides an environment that meets some of the strictest security standards.

Information Gathering (Interview Mode)

Objective

“Clarify your priorities and complete the information gathering in LIFEPlan using Interview mode.”

0–10 min | Introduction and Framing

- What would you like to have clearly defined by the end of the meeting?
- What is your biggest concern right now?

10–45 min | Guided Information Gathering (Interview Mode)

- Follow the Interview mode sequence, step by step
- Complete the essentials and note what is missing (the “missing items” become action items)

45–55 min | Validation

- Your 2 main priorities + your timelines
- What we confirm today and what we complete after receiving the documents

55–60 min | Conclusion

- 3-point summary
- Next step: plan delivery at meeting 2

Closing Phrase

- *“I’m going to build your LIFEPlan, and then we’ll meet again for the plan presentation.”*

LIFEPlan Preparation

After Meeting 1, you have already done the most important part:

All the information collected is already entered and positioned in LIFEPlan.

In other words, you do not have to “build” the file from scratch: the system has already placed the data in the appropriate tabs (net worth, goals, income, plans, benefits, expenses, etc.).

Your work is mainly to validate the information, complete what is missing, and structure the recommendations before delivery.

To guide you quickly, you can simply open each tab and watch the related video capsules: just click the help / capsules icon (available throughout the platform screens).



Each capsule tells you what to verify, what to complete, and how to interpret the information. This allows you to move forward, tab by tab, in a logical sequence, until the file is consistent and ready to deliver.

Keep this in mind: with LIFEPlan, you deliver an implementation plan. All of the client’s goals are illustrated, along with the strategies to put in place to achieve them.

Interview mode even allows you to determine the monthly amount allocated to the plan. You must therefore design the plan in a way that respects the client’s budget capacity.

This amount applies to both the accumulation side and the protection side.

Plan Delivery + Decisions

Objective

Leave with a clear direction and concrete next steps.

Review of Priorities (5 min)

- “Let’s confirm: your priorities are X and Y, correct?”

Key Findings (10 min)

- What has the greatest impact on your trajectory
- What needs to be adjusted first

Scenarios (15–25 min)

- Scenario 1 – Your financial path / 2 – Financial impacts / 3 – Solutions
- The client understands your recommendations and can assess their impact on their plan

Decisions (10–15 min)

- *“And do you feel my services could be helpful to you?”*
- *“This is my business process with all my clients, and your LIFEPlan will become the central point of our client-advisor relationship.”*

By the End, Your Client Should Ideally Be Able to Say:

- “I would like you to become my advisor.”
- You then need to explain the implementation process for the recommendations (asset transfers, solution applications/subscriptions).



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