**PROBLEM**

- **Company**: Increase types of clients to increase diversity
- **Client**: Need assistance in protecting business and families
- **Company**: Increase market share among the Greater Seattle area
- **Client**: Prepare individuals for retirement through a diverse portfolio
- **Company**: Necessity to increase the number of women in financial services
- **Client**: Conduct wealth accumulation in order to provide a legacy

**RECOMMENDATION**

- **Extend Network through joining Issaquah Chamber of Commerce**
  - Issaquah Chamber of Commerce has 500+ members
  - Managed the relationships through contacting previous employers

- **Contact Business Owners and Develop a Basis of Connected Individuals**
  - Used network directory to set up meetings
  - Attended networking opportunities to contact others and keep up with competition

- **Develop a shadowing opportunity for young high school women**
  - Researched business organizations in Seattle area to develop marketing plan
  - Researched computer science program working to include women as well

**1. FINDING PROSPECTS**

- Utilize Natural Market from Recreational, Employer, and Service Experiences
- Extend market through networking with Issaquah Chamber of Commerce

**2. INITIAL APPROACH**

- Reach out to 30+ individuals from natural market per day
- Call one segment of Issaquah Chamber of Commerce Directory every day

**3. FACTFINDING APPOINTMENT**

- Conduct a Business Owner Factfinder to identify goals for the business
- Conduct an individual Factfinder to identify current status and build rapport

**4. EVALUATING ALTERNATIVES**

- Provide low, middle and high solutions based on client needs
- Provide alternatives based on demographics of employees
- Provide a timeline for business owners to meet needs for all employees
- Develop a plan based on ability to buy and current needs for individual clients

**5. CLOSING**

- Meet with clients to start with next step especially before birthdays

**6. SERVICE SUPPORT**

- Call back companies to check in with clients to update them
- Meet with clients to start with next step especially before birthdays

**WOMEN INCLUSION**

- Target High Schools with DECA
- Meet DECA chair heads in Seattle

- Develop Shadow Opportunity for Female Students
- Sit in Business Classes and discuss financial services

**CLIENT SOLUTIONS**

- Identify Client Needs Based on Existing Assets, Liabilities, & Listening
- Develop a plan incorporating current and future assets, and liabilities.

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