|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| The Supernova Folder System |  |  |  |  |
| **Client Folders include:** |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **First Page** |   | **Client information and critical contacts** |   |   |  |
| **Second Page** | **Planning and implementation documents** |   |  |
| **Third Page** |   | **Client current statement** |   |   |   |  |
| **Fourth Page** |   | **Cash Flow Analysis** |   |   |   |  |
| **Fifth Page** |   | **Agenda for the client meeting** |   |   |  |
| **Last Page** |   | **Blank Lined Paper for taking notes** |   |   |  |
|  |  |  |  |  |  |  |  |
| **Prospect folders** |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **First Page** |   | **Information you have found on the prospect. A good source is** |  |
|  |   | **to Google the prospect Not only do you find information on the** |  |
|  |   | **prospect's business/jot, you can find info on other interests as** |  |
|  |   | **charities, school & family. A Cautionary note: make sure you have** |  |
|  |   | **the right information with the right person** |   |  |
| **Second Page** | **Planning that you might have done for the person or**  |  |
|  |   | **statements he may have shared with you and a log of the calls** |  |
|  |   | **made to the prospect and what was discussed.** |   |  |
| **Third Page** |   | **Agenda for the call. This could be what you are talking about with**  |  |
|  |   | **your clients month to month. Give prospect same experience.**  |  |
| **Fourth Page** |   | **Blank lined paper for FA to make notes as he talks to prospect** |  |
|   |   |   |   |   |   |   |  |
|  |  |  |  |  |  |  |  |
| **Mini me Folders (you give to the client to keep) will include:**  |  |  |
|  |  |  |  |  |  |  |  |
| **First Page** |   | **Client information and critical contacts. Also include a description** |  |
|  |   | **of your team and who is responsible for what.**  |   |  |
| **Second Page** | **Current statement and/or information about your portfolio** |  |
| **Third Page** |   | **Agenda** |   |   |   |   |  |
| **Fourth Page** |   | **Blank lined paper for taking notes** |   |   |  |
|  |  |  |  |  |  |  |  |
| **Center's of Influence Folders** |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **First Page** |   | **Information about the COI and his business. Include a script you** |  |
|  |   | **can use when recommending him/her** |   |   |  |
| **Second Page** | **A list of all the people you have referred to him and the people** |  |
|  |   | **he/she has referred to you** |   |   |  |
| **Third Page** |   | **Agenda** |   |   |   |   |  |
| **Fourth Page** |   | **Blank paper for taking notes** |   |   |  |
|  |  |  |  |  |  |  |  |
| **Mastermind Group: Same as the COIs**  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Niche's Folders** |  |  |  |  |  |  |
| *It is recommended that you have a minimum of 2 niches and keep a folder for each one* |  |
|  |  |  |  |  |  |  |  |
| **First Page** |  | **Information about the businesses in the niche** |  |  |
| **Second Page** | **Information about stock purchase options/stock option plans,** |  |
|  |  | **retirement plans** |  |  |  |  |
| **Third Page** |  | **List of prospects with a record of when you met with them,** |  |
|  |  | **who referred them, etc.** |  |  |  |  |
| **Fourth Page** |  | **List of current clients in that niche** |  |  |  |
| **Fifth Page** |  | **Calendar of social opportunities/business conferences/** |  |
|  |  | **meetings/conventions and other sponsorship opportunities** |  |
| **Sixth Page** |  | **Blank lined paper for notes** |  |  |  |
|  |  |  |  |  |  |  |  |
| **Community Networking Folders** |  |  |  |  |  |
| *It is recommended you are a member on the path to being president of one arts board* |  |
| *of directors and one charitable nonprofit board of directors. You will have a folder for each* |  |
|  |  |  |  |  |  |  |  |
| **First Page** |  | **Organization of the board of directors and notes from each meeting** |  |
| **Second Page** | **Information on each member (Include if they are referrals, clients** |  |
|  |  | **prospects)** |  |  |  |  |  |
| **Third Page** |  | **Calendar of events** |  |  |  |  |
| **Fourth Page** |  | **Information about the committee you serve on including dates of** |  |
|  |  | **meetings, notes from those meetings and your "To Do" list** |  |
| **Fifth Page** |  | **Action plan for becoming president/record of your donations/** |  |
|  |  | **sponsorships** |  |  |  |  |