|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 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** | |  |  |  |  |