Applying the Financial Transitionist® Model to Pro Bono Financial Planning:

Establishing Alignment, Trust, and Communication with Clients Facing Life-Disrupting Events

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FTI Client Materials offered as part of the FFP webinar by Susan K Bradley.

Pre-Meeting Prep Sheet

One Page Alignment and Action

Sort and Prioritize by Life Categories

For more information use the chat box at www.financialtransitionist.com
or email info@suddenmoney.com

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Pro Bono Meeting Prep and Review

Name____________________ Date_________________

Event:

Health Challenge, Cancer, Job Change, Natural Disaster, Domestic Abuse, First Time Home Buyer, Veteran, Layoff, Other_____________

Notes:

What is their current stage of transition?

Anticipation/Preparation Ending/Active Decision-Making Passage/Adjusting to Change

Notes:

What behaviors or traits do you see?

Identity Intact Clarity	Focused	Identity Compromised	Numb/Withdrawn Frozen
Hopeful/Resilient	Attentive	Confusion/Overwhelm	Narrow Focus
Realistic About Possibilities	Consistent Behavior	Hopeless	Fractured Focus
Refreshed/Energized	Composed	Invincible	Inconsistent Behavior
Open/Collaborative		Mental & Physical Fatigue	Combative

What needs protection, what do they care most about?

Actions:

Now: Urgent

Soon: Important not Urgent

Later:

What could be done to help increase their three C's:

Clarity Confidence Control

NOTES:

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Sample Structured Conversation With Action Steps

What needs to be Protected?	Choices/Decisions
Priorities NOW: SOON: LATER:	Consequences/ Outcome

Action	Why	How	When/By Whom

Checklist For Uncertainty

Cash Flow

Family

Insurance

Home Options

Medical

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