

Keystone Habit: Asset-Map Client/Prospect Reviews

The single most effective activity that promotes positive advisor interaction with clients has been the 10-minute Asset-Map® Report review. It is during this facilitated conversation with clients using the Asset-Map framework that most client financial issues are uncovered and opportunities to add value are revealed. Making

sure that advisors complete a goal-based number of reviews per week has been shown to be instrumental in long-term successful production. Use the chart below to set and track a 3-month plan to achieve your desired weekly Asset-Map® activity with clients and prospects. Additional resources can be found at [support.asset-map.com](https://support.asset-map.com)

- STEP 1. HOW MANY (2-5/week)?  
Indicate the target number of Asset-Maps that will be completed for each week: \_\_\_\_\_
- STEP 2. WHO? Indicate the specific household names below that will be completed, reviewed and scheduled in each week (two weeks in advance).
- STEP 3. GET IT DONE.

Week	Household 1	Household 2	Household 3	Household 4	Household 5
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					