



# THE PERFECT RIA

## HOW TO REACH MATTHEW

Mobile Phone/Text: 123.456.7890

**TEAM MEETINGS:** Monday & Thursday calls. Email scorecard, questions, concerns and agenda two hours in advance. One-on-one meetings scheduled for 30-min each week after Monday team meeting and as needed.

## HOW TO SCHEDULE CLIENT MEETINGS

Phone Appointments: Check for time difference. Ideally schedule Tuesday & Thursday. Matthew will call client via the office or through zoom (needs to be confirmed/tested)

Zoom meetings: Zoom meetings are scheduled the same as phone appointments.

**IN PERSON MEETINGS:** Matthew is grouping all his appointments into certain weeks each quarter. His next availability is...

October 8<sup>th</sup> to 19<sup>th</sup>

January 21<sup>st</sup> to 31<sup>st</sup>

**IN CASE OF URGENT ISSUES:** Confirm with Matthew nearest airport and book the next available flight back to Seattle. In almost every scenario Matthew can be back to the office within 48 hours.

**ANSWERING COMMON CLIENT QUESTIONS/CONCERNS:** (Matthew's WORKING remotely)

Where is Matthew? *He's working remotely right now while traveling with him family. Currently he and his family are exploring (location updates by Matthew). While he's not in the office, he is still working regular hours via his laptop. Would you like me to schedule a call with him?*

Can you tell me more? *Gladly. Matthew, his wife Jackie and their three kids ages 12, 10 & 8 are ... (Fill in wherever they are) Thanks to technology and commercial air travel, Matthew can do this without impacting clients, in fact we talk to him almost daily.*

I won't/can't wait to meet with Matthew. *No problem. Matthew is committed to not letting his family adventures impact clients and he's always just one flight away from the office. Let me have him call you tomorrow to figure out a solution that works for you.*

What about...?!? *That's a great question for Matthew. Can I have him give you a call tomorrow?*