



RIGHTSIZING

A Downsizing Generation!

with Pam Ermen

1. DOWNSIZING vs RIGHTSIZING...*What's the Difference?*

Understanding an Aging Generation: *The Stats are Staggering!*

- _____
- _____
- _____

Notes:

2. Defining the RIGHTSIZING Timeline...*Where Do They START?*

Counteracting "FEAR of Loss" ...*It's Much MORE than Money!*

- *Reference:* _____

Becoming Their Trusted Advisor ...*Emotional Selling or Emotional Support?*

- _____

- _____

- _____

- _____

Creating a **RIGHTSIZING** Checklist!

Step by Step	Purpose	Notes
Step 1		
Step 2		
Step 3		
Step 4		
Step 5		
Step 6		
Step 7		
Step 8		
Step 9		
Step 10		

It's a FAMILY AFFAIR ...and Friends and Neighbors and Advisors!

“

_____?”

4. MARKETING INSIGHTS...Making a Connection with the RIGHTSIZING Generation

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

Developing a Rightsizing Seminar...What is the BEST Idea you have for creating value for those who attend?

Notes:

Building VALUABLE Connections in the Aging Community...

- ---

- ---

- ---

- ---

- ---

5. WRAP UP

Are you IN...or... Are you OUT?

- Are you willing to spend the time, effort and emotional energy necessary to provide specialized service this particular generation of Baby Boomers and Mature Clients?*
- If so, what will be your 30 day plan to get started?*
