

Discovery Call Outline for Advisors

Advanced Tax Optimization & Retirement Income Strategy



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Phase 1: Opening (Set Context)

Keep this natural and brief—this is not a sales pitch.

“I wanted to take a few minutes today to revisit your overall financial strategy—specifically around taxes and long-term wealth building.

A lot of business owners we work with are leaving significant opportunities on the table when it comes to redirecting taxes into long-term income strategies.”

Phase 2: Pattern Interrupt (Create Curiosity)

“Quick question—do you feel like you’re paying more in taxes than you should be, relative to how much you’re actually building for yourself long-term?”

(Let them respond)

“That’s exactly what we’ve been helping clients solve—keeping more of what they earn and turning it into structured, predictable wealth.”



Phase 3: Qualification Questions (Conversational)

Income & Stability

“What has your income looked like over the last couple years—pretty consistent?”

“Do you expect that to stay steady or grow?”

Tax Awareness

“Ballpark—how much are you paying in taxes each year?”

“If there was a way to legally reduce that and redirect it toward your future, how interested would you be?”

Current Strategy

“Are you currently maxing out your existing retirement or tax-advantaged options?”

“After that, do you still feel like you have excess cash that isn’t being used as efficiently as it could be?”

Team Structure

“How many employees do you currently have?”

“Do you expect that number to change much?”

Future Vision

“When you think about retirement, are you more focused on a lump sum—or predictable income coming in every year?”

“How important is it for you to create something that benefits your family long-term?”



Phase 4: Position the Opportunity

Tie together what they said—make it feel personalized.

“Based on what you’re telling me—especially around [tax burden / excess cash / long-term income goals]—you may be a really strong fit for some more advanced strategies we’ve been implementing for clients in similar situations.”

“These go beyond the typical approaches and are specifically designed for business owners who want to significantly reduce taxes while building long-term, predictable income.”

Phase 5: Introduce the Specialist (Soft Transition)

“What I’d recommend is a quick strategy session with a specialist we work with. They focus specifically on designing these types of structures.”

“It’s not a commitment—it’s really just to map out what *could* be possible based on your situation.”

Phase 6: Set Expectations

“On that call, they’ll walk through:

- What kind of tax savings may be possible
 - What the structure would look like
 - What level of contribution or commitment is required
 - And how it translates into long-term income”
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Phase 7: Close for Next Step

“Would you be open to a quick 20–30 minute call just to explore it?”

(If yes)

“Great—I’ll coordinate that and make sure they’re prepared with your situation so it’s a productive conversation.”

Phase 8: Reinforce Advisor Role

“And I’ll stay involved throughout the process to make sure anything recommended aligns with your overall plan.”

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