



# BUSINESS PLANNING STRATEGIES

## NAPKIN CONCEPT

### A SIMPLE IDEA

To help explain a complex concept or idea on a single piece of paper

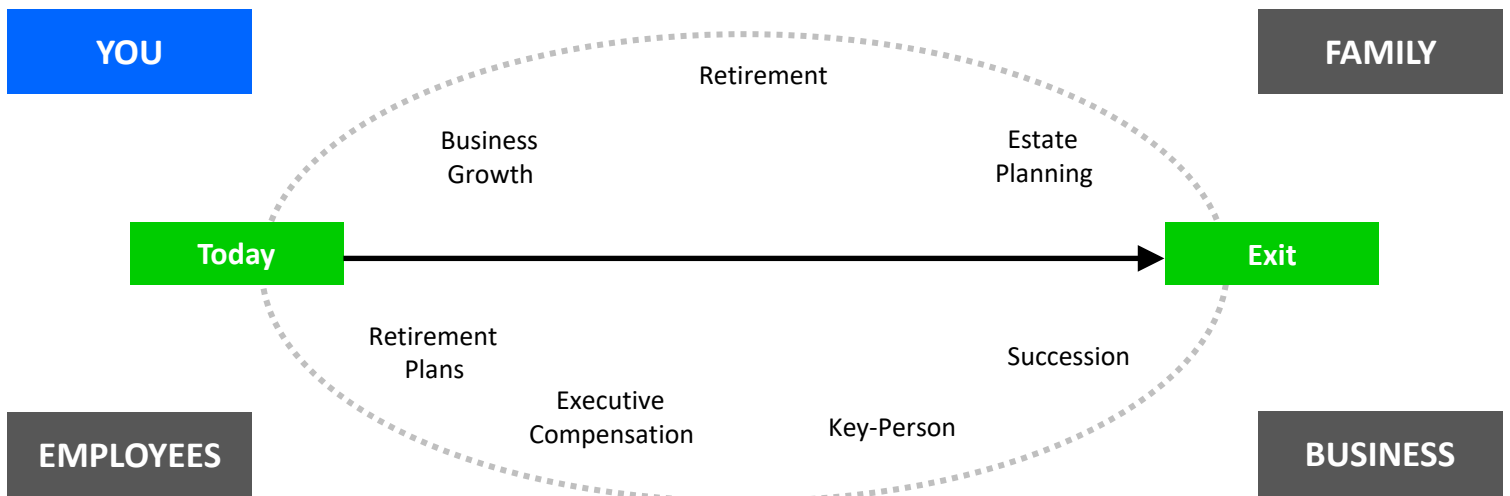
### HOW TO EASILY ADDRESS THE FAMILY, EMPLOYEES, BUSINESS, AND ESTATE NEEDS

#### HOW TO USE THE NAPKIN SCRIPT

- 1 Schedule a client event or individual meeting.
- 2 Take a napkin and unfold it. Draw a line across the middle and write TODAY on one end and EXIT on the other.
- 3 Fill each quadrant on the napkin with the four blocks below (You, Family, Employees, Business)
- 4 Follow the linked script below

#### THE INTRODUCTION

*“On this napkin, I can show you what I can do for you, your family, employees, business, and estate.”*



[CLICK HERE FOR THE SCRIPT](#)

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