

Loral's Big Table Milestone Checklist

	Attend at least one Accountability Call per week
	Attend at least one Laser Call per month
	Digest items in WFP, complete workbooks
	120 Day Plan completed
	Business accounts set up
	Business Plan created
	Wealth Plan created
	Content developed for website
	Website created
	Landing page created (collect names, phone #'s & emails)
	Set up a data base system
	Lead generation - 10-20 names, phone #'s & emails per day
	Call 20 people a day
	Complete money rules
	Solidify sales process
	Marketing/Sales Funnel complete
	Fill in data base
	Quick Books or equivalent set up
	Filing cabinet organized
	Create/update/review social presence (Face Book, Twitter)
	Set up Entity ('s)
	Create Tax Plan
	Asset Plan begun: Asset classes and percentages allocated to each
	Write a Press Release
	Team in place (hire as needed)
	Have a "Grand Opening" party
	Speak or Present at 2-6 events per month
	Update & review profit & loss statement (bring to session 3)
	IRA or retirement funds strategy
	Develop 2 new pieces of content every week
	Write an article and or Blog
	Continue to educate children if applicable
	Continue Asset Allocation Planning
	Insurance & Trust review
	Perform Due Diligence on 2 Different Investments
	Find JV or Affiliate partner