Invitation Talking Points**: Framing It Up with the Kids**

**Share these talking points with your clients for either or both of you to use when discussing the upcoming meeting with the kids. The point here is to set the kids at ease, and ensure they understand the purpose of the meeting and what will occur.**

* We’ve done all this great planning and we want to share all this powerful news with you.
* Mom and Dad are going to be just fine.
* They have done a great job of planning for everything in advance and you probably should, too.
* There are a lot of things your Dad and I want to share with you about the planning we’ve done for the family.
* This is not a stodgy business meeting, it’s a special time for us to get together and talk about some things we don’t often discuss.
* There is nothing for you do or worry about ahead of time.
* We want you to get to know our financial advisor what we’ve been doing all these years with him/her.
* It’s time to bring you into our plan, so you know what we’d like you to continue doing in the future with what we’ve planned so far.
* (As needed) We’ll work around your schedule and fly you here, or we’ll all come there.
* This is a special family event.