

The Transition Game Plan – The Facet Way



The Transition Conversation

Experience and guidance every step of the way

- 1 Call scripts & guidelines
- 2 FAQs, objections & rebuttals framework
- 3 Team & 1-on-1 coaching



Custom Transition Game Plan

Consistent, repeatable process designed around your workflow

- 1 Transition tailored to you
- 2 Hands on collaboration with Facet's team
- 3 Flexible, iterative process



Client Transition Experience

Seamless, easy transition to Facet Wealth

- 1 Seamless, high-touch transition
- 2 Dedicated CFP® Professional
- 3 Facet Financial Life Plan evolves with client goals

Your Dedicated Team

Transition Specialists

Expertise in crafting a custom game plan for your firm



Brent Weiss, CFP®, ChFC®
Co-Founder & Head of Planning

Harry Kirkpatrick, CFP®
Head of Onboarding

Client Success Managers

Delivering an amazing transition experience for your clients



Andy Barton

Tara Floyd

Dedicated CFP® Professionals

Depth and experience to deliver excellent planning and service.



David Wirth, CFP®

Hali London, CFP®