

CHRIS NICHOLS: LIFE INTERTWINED WITH WEALTH MANAGEMENT

Written by

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1

INT. JOHN DOE'S OFFICE-DAY

1

A clock ticks. The time says 8pm. Two men, wearing slacks and button-up shirts with the sleeves rolled up, stand at a desk looking over a set of blueprints. We focus on ONE MAN that directs the other on what to do with the plans. This man is John Doe (Male, Caucasian, 55, slim, clean cut, professional).

CHRIS NICHOLS (V.O.)

A successful person knows when to work hard.

John Doe leaves the office and in the same shot....

2

EXT. JOHN DOE'S BACKYARD-DAY

2

....walks into his backyard, now wearing shorts and a button up shirt, and opens a smoking BBQ. His two kids, who are in their early 20s, play frisbee with the dog in the background, and his wife hands him a plate of raw steaks (could be any type of food).

CHRIS NICHOLS (V.O.)

He knows when to play hard.

The raw steaks are put onto the grill. John Doe closes the grill (the frame goes black).

3

INT. CHRIS NICHOLS' OFFICE-DAY

3

John Doe walks into frame and shakes Chris' hand, as they meet for the first time.

CHRIS NICHOLS(V.O.)

And he knows how important financial planning is for his and his family's future.

The door shuts to see the Universal Partners logo on the front.

Chris Nichols invites his new client, John Doe, to a seat at his desk. And the two begin to chat back and forth. We do not hear what they say, but it is in a business like manner. Both men project a straight forward, sense of humor, conversation based on the importance of "business" as their number one priority. We focus on Chris Nichols.

CHRIS NICHOLS (V.O.)

As a partner at Universal Partners,
I bring this understanding into my
career as a financial advisor with
a personal one-to-one approach to
wealth planning.

The client opens a folder of documents that show what his financial picture look like (how do clients present their portfolio to you? they usually bring a bunch of unorganized statements in a folder- you may want to accentuate the "mess" they bring to me). John Doe's demeanor looks like he has some serious questions. Chris Nichols looks at these papers and in return asks John Doe a few questions.

CHRIS NICHOLS (V.O.)

We get to know your whole financial
picture by understanding what is
important to you.

Chris Nichols demeanor ups the intensity in response and begins to asks John Doe questions.

THE SEPARATE V.O. LIP-SYNCS TO THE QUESTIONS BEING ASKED.

CHRIS NICHOLS (V.O.)

What do you want to do in
retirement that you couldn't do
while working? What do you value
most in life? What would you like
your legacy to be?

The client sits back in his seat and ponders the questions he has just been asked.

4 EXT. JOHN DOE'S BACKYARD-DAY 4

THE MUSIC CHANGES INTO A MOTIVATING FEEL.

John Doe looks up from the grill to one of his kid's throwing the frisbee into the pool. The dog jumps into the pool as it chases after the frisbee (slow motion). From a wave in the pool....

5 EXT. OCEAN-DAY 5

....to a wave in the ocean as a sailboat glides past the camera. On the sailboat John Doe and his wife (both are slightly greyer, and with a few more wrinkles) have a romantic chartered sailboat getaway.

6 EXT. IN FRONT OF JOHN DOE'S HOUSE-DAY 6

Older John Doe, his wife, and an excited and older and more professional looking daughter, dressed in a graduating gown, pose for a picture.

7 INT. JOHN DOE'S LIVING ROOM-DAY 7

John Doe's son (wearing clothes that fit a young man in his thirties) enters a house holding a baby. The two families greet each other.

8 EXT. JOHN DOE'S BACKYARD-DAY 8

John Doe, now back to being 55 years old, looks at his family.

CHRIS NICHOLS (V.O.)
After we understand these important
"drivers..."

9 INT. CHRIS NICHOLS' MEETING ROOM-DAY 9

In the meeting room Chris Nichols is presenting some info about John Doe to a group of other financial advisors; "the team."

CHRIS NICHOLS (V.O.)
....our team will put together a
personalized, goal-based plan that
proactively tracks your financial
progress relative to your overall
goals.

10 EXT. JOHN DOE'S BACKYARD-DAY 10

The table of the meeting room turns into the table where the family is setting up their fresh-off-the-grill BBQ. The individual plates of food are put onto the table.

11 INT. CHRIS NICHOLS OFFICE-DAY 11

An individual plate of food turns into John Doe's custom wealth plan (how is a plan create and delivered? we can show me flipping through a wealth plan- that includes pie charts, spreadsheets- it kind of looks like a book- hardbound). John Doe picks up his wealth plan and starts to looks at it.

CHRIS NICHOLS (V.O.)
 Change is constant; it takes a lot
 of hard work and responsibility to
 stay proactive....

12 EXT. JOHN DOE'S BACKYARD-DAY 12

The dog scrambles to finish all the food left alone on the table. The family runs in to stop the dog. They all happily laugh together.

CHRIS NICHOLS (V.O.)
 ...in the roller coaster that is
 today's marketplace.

13 INT. JOHN DOE'S FACTORY-DAY 13

The object in the blueprints John Doe was looking at in the first scene is realized and is being built at his factory.

(WHAT WE SEE IN THE BLUEPRINT IS DETERMINED BY THE PLACE WE
 GET TO FILM AT)

CHRIS NICHOLS (V.O.)
 That is why we use a proactive
 investment management system to
 monitor your accounts and...

John Doe is overseeing blueprints to the actual build. (He is one the the men that takes a project from concept to completion.) He directs some workers.

CHRIS NICHOLS (V.O.)
when the risk in the financial
 marketplace is too high we can take
 action to mitigate those risks on
 your behalf, in an effort to
 protect your money.

We focus on specific parts that are being worked on. Then we focus on John Doe taking a moment to himself as he looks at this project he has worked for months on come to near completion.

CHRIS NICHOLS (V.O.)
 After all, if nearing retirement
 your main goal is most likely to
 protect what you've worked a
 lifetime for.

(MORE)

CHRIS NICHOLS (V.O.) (CONTD)
 For our clients this means
 "confidence in your investments.

THIS SCENE IS MIXED WITH VISUALS OF THE OFFICE OR WHAT A PROACTIVE MANAGEMENT SYSTEM IS. AND WHEN CHRIS NICHOLS SAYS "CONFIDENCE" THAT IS SYNC'D WITH JOHN DOE SAYING CONFIDENCE, AND A SUBTLE LOOK OF RELIEF ON HIS FACE.

- 14 INT. CHRIS NICHOLS' OFFICE-DAY 14
 John Doe and Chris Nichols shake hands. John Doe is proud to be working with Chris Nichols.
- 15 INT. JOHN DOE'S BEDROOM-VERY EARLY MORNING 15
 The alarm clock rings. John Doe gets up. He kisses his wife. And leaves the house.
- 16 EXT. ROADS-SUNRISE 16
 John Doe jogs.

CHRIS NICHOLS (V.O.)
 Being an independent firm allows us to be open minded in determining which financial instruments are suitable for you. We have no pursuit in selling you a product or service that is not in your best interest.

At the end of a jog John Doe ends up on a levy in the Everglades and, just at the moment, he stops to watch the sun rise over the Everglades.

CHRIS NICHOLS (V.O.)
 Why would it be anything less?
 This is your life. Your wealth. You earned it.

- 17 INT. CHRIS NICHOLS' OFFICE-DAY 17
 Chris Nichols walks John Doe office's front door. John Doe leaves and the camera stays on Chris Nichols watching contently.

CHRIS NICHOLS (V.O.)
My name is Chris Nichols. As a
proactive wealth manager, I define
my career by building strong
relationships based on trust and
credibility.

Chris Nichols turns around and walks away from the camera and
into the busy office. The frame blurs and we see the logo,
contact info (final title card).

CHRIS NICHOLS (V.O.)
Whether you are looking for a
different opinion or just need
advice, call us today to schedule a
complimentary consultation and tell
us "how do you want to define your
wealth management?".

And below everything in the final title card, in bold and
underlined letters, is;

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