New Client Flowchart

INTRODUCTION is received…

Pre-Appointment

A series of calls and written communication received by the potential new client to set the stage for the 1st Appointment.

The Pre-appointment process establishes your process for bringing on a new client and allows you to introduce yourself in a professional manner.

1st Appointment

Is There a FIT?

"FIT" establishes the framework for a long-term relationship and gives you complete control over which new clients you bring into your practice.

2nd Appointment

Financial Fact Finding
& Introduction Process

Develop a comprehensive financial profile for your new client. You will also share your Introduction Process with them for the first time.

3rd Appointment

Implementation &
The Personal Financial Organizer

Present your new client with a tangible deliverable they will value and understand – the PFO.

Welcome Process

A series of client service activities implemented over the first 4-6 weeks to 'welcome' your new client.

Your new client will experience a welcome process: a continuation of your client-focused approach. This bridges nicely to your ongoing Client Experience.

The Client Experience

Now your new client begins to experience your proactive service model.