

Client Meeting Protocol

This resource outlines the desired rules of engagement for setting up client review meetings in this practice. If there is an urgent or high priority situation, discuss it immediately with the Advisor to see if an exception is appropriate and schedule accordingly. This outline has been created to provide a manageable structure and approach to setting and conducting Client Meetings.

Client Meeting Days

- Appointment Days: Tuesday, Wednesday and Thursday
- No appointments to be scheduled the day after vacation

Client Meeting Times

- Earliest appointment to be set is 9:00 am
- Latest appointment to be set is at 3:00 pm
- Schedule each appointment for 2 hours and indicate as “Appointment” in activity type

Client Meeting Maximum per Day

- No more than 3 meetings per day
- No appointments back-to-back - leave a minimum of 30 minutes between appointments

Out of Office Meetings

- Out of office meetings can be set on Wednesdays
- Clearly indicate in the “Location” field it is an OUT OF OFFICE and include the address in the notes box

Lead Time for Scheduling Meetings

- Client meetings should be scheduled 5-10 business days in advance

Confirmation Call

- All clients are to receive a confirmation call 2 days prior to their scheduled meeting

Sample Day:

- 9:00 am -11:00 am Meeting #1
- 1:00 pm – 3:00 pm Meeting #2