Client Process Generator

Best Practices establish a 6-Step Client Financial Planning Process, to establish this scope of the client/advisor relationship. We will follow that process as a mutual starting point.

Contact Information

Advisor Name

Date

Address

Email Address

Phone Number

Branding

Upload corporate logo:

UPLOAD HERE

Primary color:

Secondary color:

Pantone Numbers if Possible

Please share existing marketing pieces:

ATTACH HERE

Client Model Process

Name (Marketing Purposes)

1. Establish the Scope of the Relationship

2. Gather Data

3. Analyze the Situation

4. Craft Recommendations

5. Implement Recommendations

6. Monitor Plan

Complete and return this form and we will schedule a time to talk about timelines and printing options.

SUBMIT HERE

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