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| **New** **Client Onboarding**  |  | *Creating a first class client experience begins well before your client has entered your office. Having a well-defined process for each client touch point will cement yourself as the advisor of choice and create life-long advocates.* The new client onboarding process covers the first year of your relationship and details the key steps involved in delivering unrivaled value and service. Complete this process template with the assistance of your team. The first lines have been filled in to help get you started.  |
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|  | **# of Days** | 🗹 |
| **Assistant** ensures that the advisor receives the new client onboarding package prior to the meeting and all documents are included. | 1 |  |
| **Advisor** has a brief meeting with assistant to provide any background information on the client and discuss any issues around process such as review of flowchart, timelines, roles etc. | 3 |  |
| **Assistant** creates a welcome letter, has the advisor sign and mails it to the client. | 3 |  |
| **Assistant** prepares meeting summary notes and action plan and forwards to advisor, who emails to client. | 5 |  |
| **Advisor** calls new client regarding the account opening process and discusses the status of any action items – asks client if they have any questions. | 10 |  |
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