10 Step Client Process

STEP 1
Getting to Know the Client

STEP 2
Describe Your Unique Approach

STEP 3
Provide Financial Questionnaire

STEP 4
Explain Compensation

STEP 5
Discuss Future Introductions

STEP 6
Review Financial Questionnaire

STEP 7
Find Inefficient Strategies

STEP 8
Discuss Alternatives

STEP 9
Create the Plan

STEP 10
Take Action

1st Visit
(Steps 1 - 5)

2nd Visit
(Steps 6 - 10)

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