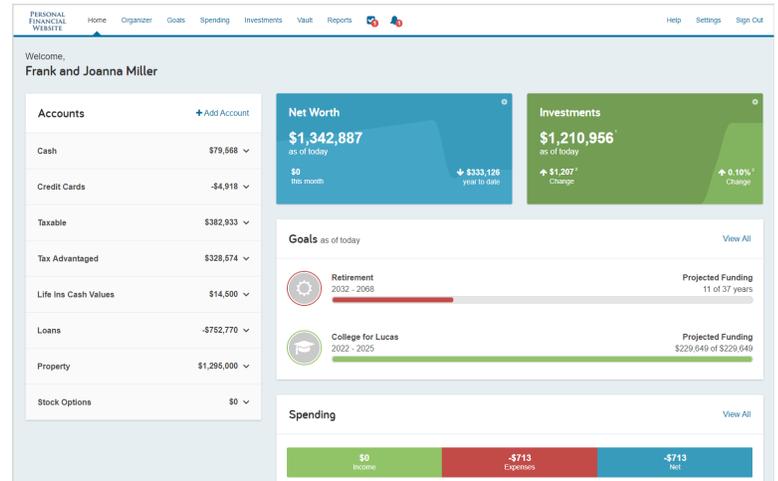


Guide to The Client Experience

This guide will outline the recommended steps to take before, during, and after you have given your Client access to their Client Website. It includes tips, best practices, and testimonials to set you and your Clients up for success.

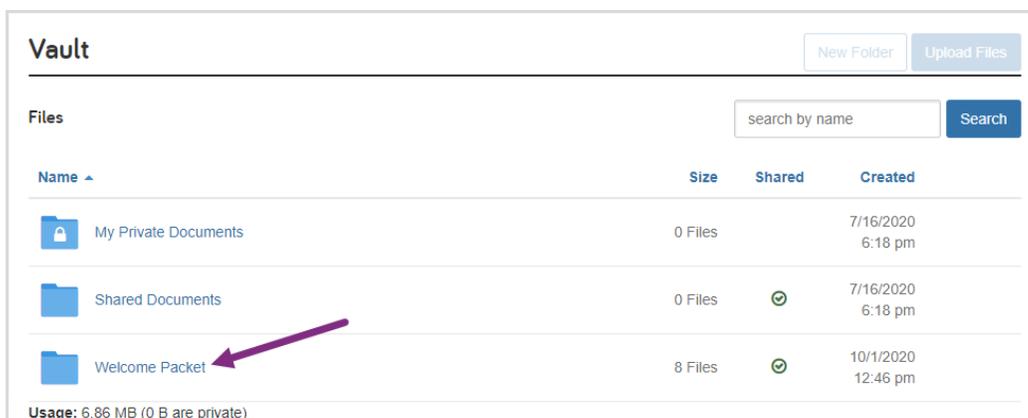
The Rollout

Before you decide to rollout the Client Website to your new and/or existing Clients, you will want to create a Client Website for yourself. It is important that you log in yourself, as the Client, and get use to the tools and features of the Client Website. You'll want to be familiar with it so that you are able to answer any questions your Clients may have, as well as truthfully talk about the value of the Client Website.



Best Practices for a Successful Rollout

- ✓ Proactively discuss Security before your Client voices any concerns
- ✓ Introduce the Client Website during an in-person meeting
- ✓ Set an expectation that all important communication will take place through the Vault (i.e. Reports, fact-checking documents, etc.).
- ✓ Explain that the website is bi-directional and using it is a part of your process. Help them understand that what they enter is flowing through to the plans you build for them.
- ✓ Turn on the Onboarding wizard for their first login.
- ✓ Turn on the Client Login Inactivity Alert. This alert will trigger if your Client hasn't logged into their website in a certain amount of days. Once it is triggered, you can upload a document to their Vault to help re-engage them.
- ✓ Turn on the Onboarding Alert. This alert will trigger when your Client has completed Onboarding so you can stay on top of their progress.
- ✓ Create a Welcome Packet folder in the Vault and upload necessary Client-facing user guides.



Guide to The Client Experience

Before Your Client Logs In

✓ Connect Managed Accounts

It is important to connect any managed accounts before the meeting, so your Client sees their information populated when they log in for the first time. If you have additional information about your Clients, it is advantageous to add it before their first login. This will allow your Client to verify and update the information in real time, so you have the most updated and relevant information populating their plan.

- **If you are rolling it out *during an in-person meeting*:**

Prior to the meeting ask your Client to collect their usernames and passwords for any online accounts as well as any important documents you require in your process.

- **If you are rolling it out *through Onboarding first and then meeting*:**

Prior to sending your Client through Onboarding, email them to set expectations and explain what you would like them to accomplish with their website before you meet. You can direct them to the Welcome Packet in the Vault to help get them started.

The screenshot displays the client dashboard for Frank and Joanna Miller. The top navigation bar includes 'OVERVIEW', 'FACTS', 'PLANS', 'REPORTS', and 'VAULT'. The 'FACTS' section is active, showing a 'Net Worth' table and an 'Out of Estate' section.

Net Worth Table:

Assets	Owner	Value
Frank and Joanna Joint Investment Account	Joint/ROS	\$375,253
Joanna's Roth IRA (converted)	Joanna	\$103,431
Franks Annuity	Joint/ROS	\$0
Whole Life Policy on Frank	Frank	\$35,500
Home	Joanna	\$580,000
Liabilities	Owner	Value
Mortgage on Home	Joint/ROS	\$426,385
Total Net Worth		\$667,799

Out of Estate Section:

Assets for Lucas Miller

Assets for Lucas Miller	Owner	Value
529 Plan for Lucas	Lucas Miller	\$53,361

Assets for Mary Beth Miller

Assets for Mary Beth Miller	Owner	Value
529 Plan for Mary Beth	Mary Beth Miller	\$120,698

Guide to The Client Experience

During the Follow Up Meeting

✓ Verify Data Entry Process

Go over the Client Website Organizer together and ensure that the Client is clear on how to enter their information. It is very important that they understand this is bi-directional and flowing through to the plans you are building.

✓ Troubleshoot Client Connections

It is very important to connect accounts with them, or troubleshoot what they connected on their own together, so that they are aware of the process they must go through to connect the rest of their accounts. If the Client decides to connect a checking account or credit card, they can immediately begin using the Spending and Budgeting tools.

✓ Get the Client Website on Their Phone

The mobile bookmark can be free marketing for you. Once they have the bookmark saved on their phone, your logo will appear as well.

✓ Enter Their Goals

This is also a great time to enter their Goals and funding sources so that the next time they log in, they see their Goals and they can begin connecting the dots between the Client Website and the plans you will be building for them.

✓ Upload Documents to the Vault

If your Client brings documents or pictures with them to the meeting, help them upload those to the Vault. A simple way to accomplish this is to have them log into the Client Website on their phone, take a picture of the document and upload it to their Vault.

Tips and Resources

Welcome Packet Vault Folder

Many Advisors have found success by creating a virtual Welcome Packet inside the Vault. The Welcome Packet should contain information on security, your contact information, instructions on how to use the website and more. Listed below are some helpful documents for your Client's Welcome Packet. You can find these and more Client-facing resources in the Knowledge Base by selecting **Help** and navigating to the **Client-Facing** category.

Resources For *Your Client*.

- [Data Aggregation 101](#)
- [Adding Accounts](#)
- [Vault Checklist](#)
- [Safe and Secure](#)
- [Troubleshooting Accounts](#)
- [Forgot Your Password](#)
- [2-Factor Authentication](#)
- [Organizer Overview](#)

Guide to The Client Experience

Testimonials & Best Practices from Power Users

Use the video links below to help you understand how to position the Client Website, talk about security and utilize the Vault with your Clients.

- [How to Position the Client Website 1](#)
- [How to Position the Client Website 2](#)
- [Discussing Client Website Security](#)
- [Using the Vault to Track Client Progress](#)
- [Best Practices When Using the Vault](#)

Example of Email Template to Client

This type of email should be sent prior to the first meeting to introduce the Client Website. You can attach Client-facing resources to this email as well. To use this template, simply highlight the **text** below, right click on your **mouse** and click **Copy**. Then open a **new email**, right click on your **mouse** and select **Paste**.

Dear Client,

We have implemented an exciting new technology designed to provide you with an interactive wealth management tool and ensure transparency and holistic planning.

The available services include:

- Personal website with 24-hour access to all your financial information
- Account Aggregation with Budgeting
- Goal Monitoring
- Investment Updates
- Encrypted Vault for storing documents
- Mobile web access

We strive to provide the best strategic advice available to ensure our clients make informed investment and lifestyle decisions. This personalized planning tool will assist us in making these decisions with up-to-date and accurate financial information.

I will be sending you a Welcome Invitation to self-register your *[Personal Financial Website]*.

If you have any questions or would like to schedule an appointment, please call *[your Firm's number]*.