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WORKSHOP

Client Onboarding Made Easy: **Build Trust & Loyalty**

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45 Minutes **Key Takeaways** **fmgsuite.com**

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Housekeeping

Recording will be sent to you after the webinar.

Look out for the follow up email with today's handouts and slides

Login and follow along

Chat - feel free to chime in or minimize the chat box

What We'll Discuss

1. Creating a "New Client Welcome Series"

2. Automating birthdays and holiday greetings

3. Strategic tagging and CRM management

4. How to personalize your client onboarding process

"Firms with a structured onboarding process experience 50% greater new client retention."

(Source: Advisor Growth Strategies)

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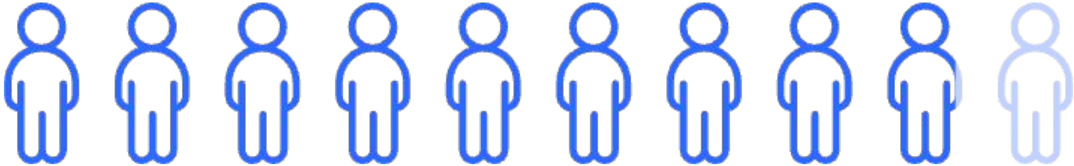
Onboarding Process

A systematic approach to welcoming new clients, setting expectations, and building trust.

- First impressions matter: Establishing trust and clarity from the start.
- Setting expectations: Clearly defining roles, responsibilities, and goals.
- Reducing client anxiety: Providing reassurance and clarity on the process.

89%



"89% of clients say a good onboarding experience is critical to their decision to stay with a firm."   (Source: Fenergo)

How Does This Improve Client Longevity?

Onboarding

A positive onboarding experience sets the tone for a long-lasting client relationship.

Client Satisfaction

Regularly measuring and addressing client satisfaction levels helps retain loyal clients.

Personalized Experience

Tailoring the service to each client's unique needs fosters a sense of partnership.

Proactive Communication

Maintaining open and transparent communication builds trust and confidence.

Continuous Improvement

Gathering feedback and implementing changes demonstrates a commitment to client success.

Loyalty

Offering incentives for long-term clients encourages them to continue the relationship.

tact Management

- Add contact to FMG or CRM
- Assign to Groups
- Make sure Birthday and Client Anniversary are noted
- Send Introduction Email with Meeting Scheduler

Pre Meeting

- Send Pre Meeting Email
- Pro Tip: Include a Video
- Pro Tip: Save this as a Template

First Meeting

- Warm Greeting and Office Tour
- Provide Welcome Packet and Swag
- Establish Communication Preferences and Frequences
- Schedule out Future Meetings
- Write a "Thank you" with FMG Greeting Card

New Client Welcome Message

MAGNOLIA

Welcome to our family!

Hi {Firstname},

We're honored that you've chosen us to guide you in your financial decisions. Your goals are at the heart of our business, and we look forward to learning more about the life you're creating so we can support you in the best possible way.

We invite you to visit our website to learn more about our services and enjoy the great educational content we have available on a range of financial topics.

If you ever have any questions, please don't hesitate to get in touch.

New Client Welcome Kit Procedure

This downloadable is designed to help you create the perfect welcome kit for every new client. With this kit in hand, your clients won't have any trouble gathering their important documents for your first meeting.

Author

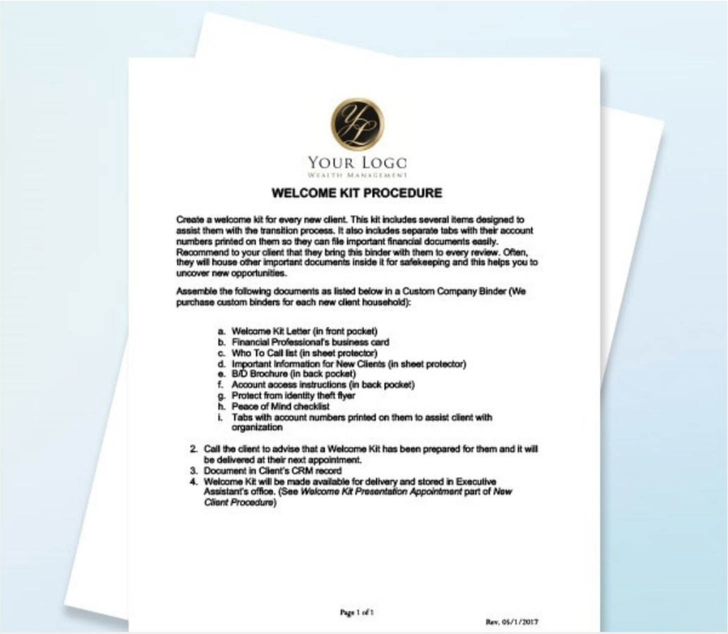
FMG: Premium

Category

Procedures

Keywords

- Downloadable
- Client Meeting
- Client Onboarding
- Client Relationship
- Financial Document
- First Meeting
- New Business



YOUR LOGO
WEALTH MANAGEMENT

WELCOME KIT PROCEDURE

Create a welcome kit for every new client. This kit includes several items designed to assist them with the transition process. It also includes separate tabs with their account numbers printed on them so they can file important financial documents easily. Recommend to your client that they bring this binder with them to every review. Often, they will house other important documents inside it for safekeeping and this helps you to uncover new opportunities.

Assemble the following documents as listed below in a Custom Company Binder (We purchase custom binders for each new client household):

a. Welcome Kit Letter (in front pocket)
b. Financial Professional's business card
c. Who To Call list (in sheet protector)
d. Important Information for New Clients (in sheet protector)
e. B/D Brochure (in back pocket)
f. Account access instructions (in back pocket)
g. Protect from identity theft flyer
h. Peace of Mind checklist
i. Tabs with account numbers printed on them to assist client with organization

2. Call the client to advise that a Welcome Kit has been prepared for them and it will be delivered at their next appointment.
3. Document in Client's CRM record
4. Welcome Kit will be made available for delivery and stored in Executive Assistant's office. (See *Welcome Kit Presentation Appointment* part of *New Client Procedure*)

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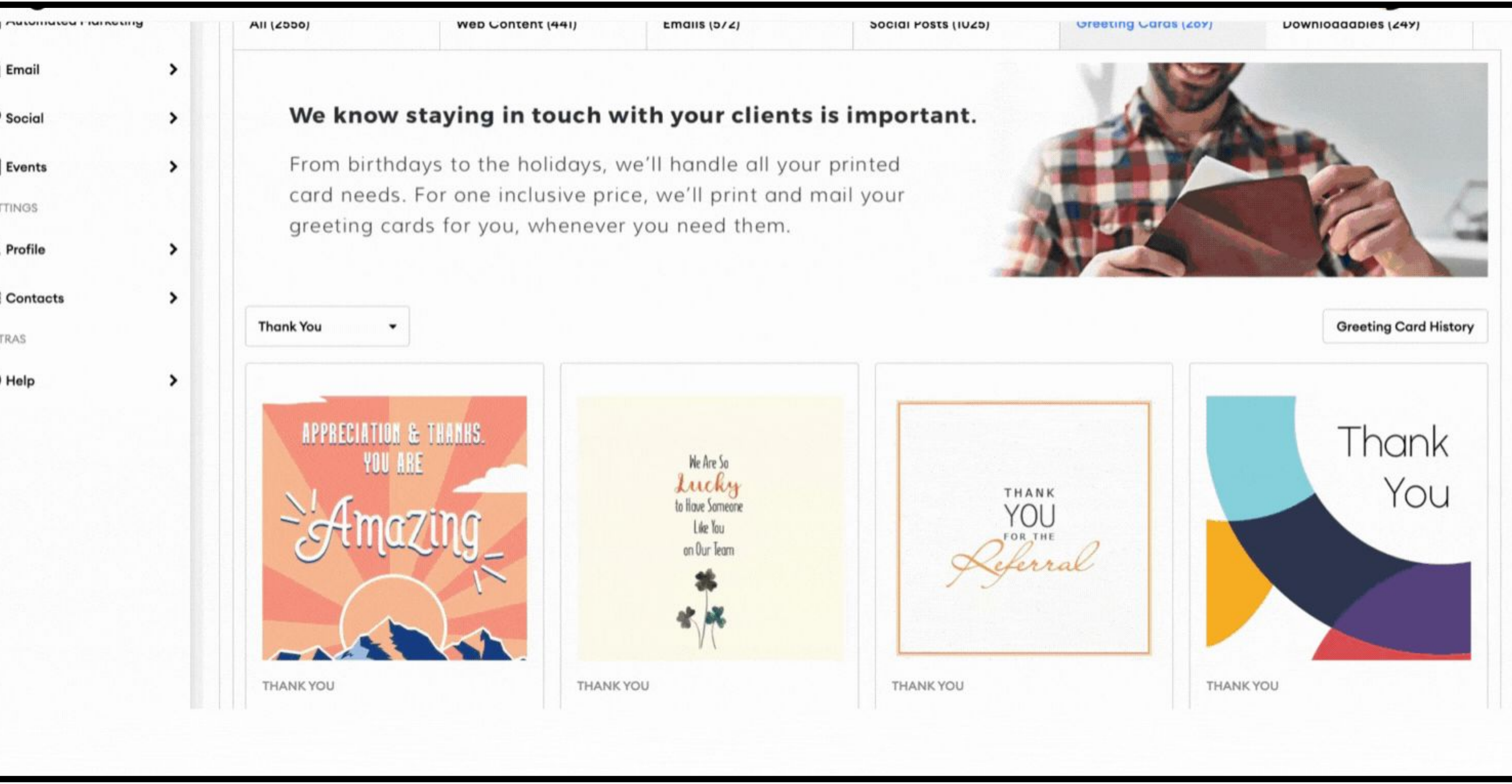
Rev. 05/1/2017

Close

Download


All (2556)
Web Content (441)
Emails (572)
Social Posts (1025)
Greeting Cards (269)
Downloadables (249)
Email
Social
Events
Profile
Contacts
Help
We know staying in touch with your clients is important.
From birthdays to the holidays, we'll handle all your printed card needs. For one inclusive price, we'll print and mail your greeting cards for you, whenever you need them.
Thank You
Greeting Card History
APPRECIATION & THANKS. YOU ARE Amazing
THANK YOU
We Are So Lucky to Have Someone Like You on Our Team
THANK YOU
THANK YOU FOR THE Referral
THANK YOU
Thank You
THANK YOU

Email	Schedule New Client Onboarding Email Sequence	Schedule meeting reminder emails for future meetings	Ensure contact is assigned to a Group and Email Automations are turned on
Social	Add contact to LinkedIn Network	Invite contact to follow your Social Media biz Pages (LI, FB, IG, X, YT, etc)	
Surprise and Delight	Welcome Gift	Schedule Greeting Cards for Holidays and Milestones	Give Referral Gift/thank you
Events	Invite to Client Appreciation Event	Invite to Webinars	

New Client Welcome Sequence

6 Emails

Emails for new clients along the first twelve months of your professional relationship. Build and establish a strong communication with this sequence.

Type

Email Sequence

Author

FMG

Keywords

Client · Communication · Feedback · Financial · Financial Statements · Greeting · New Clients · Onboarding · Relationship · Strategy

We're Here For The Long Haul

Download As PDF | Expand Email

MAGNOLIA

Hi {Firstname},

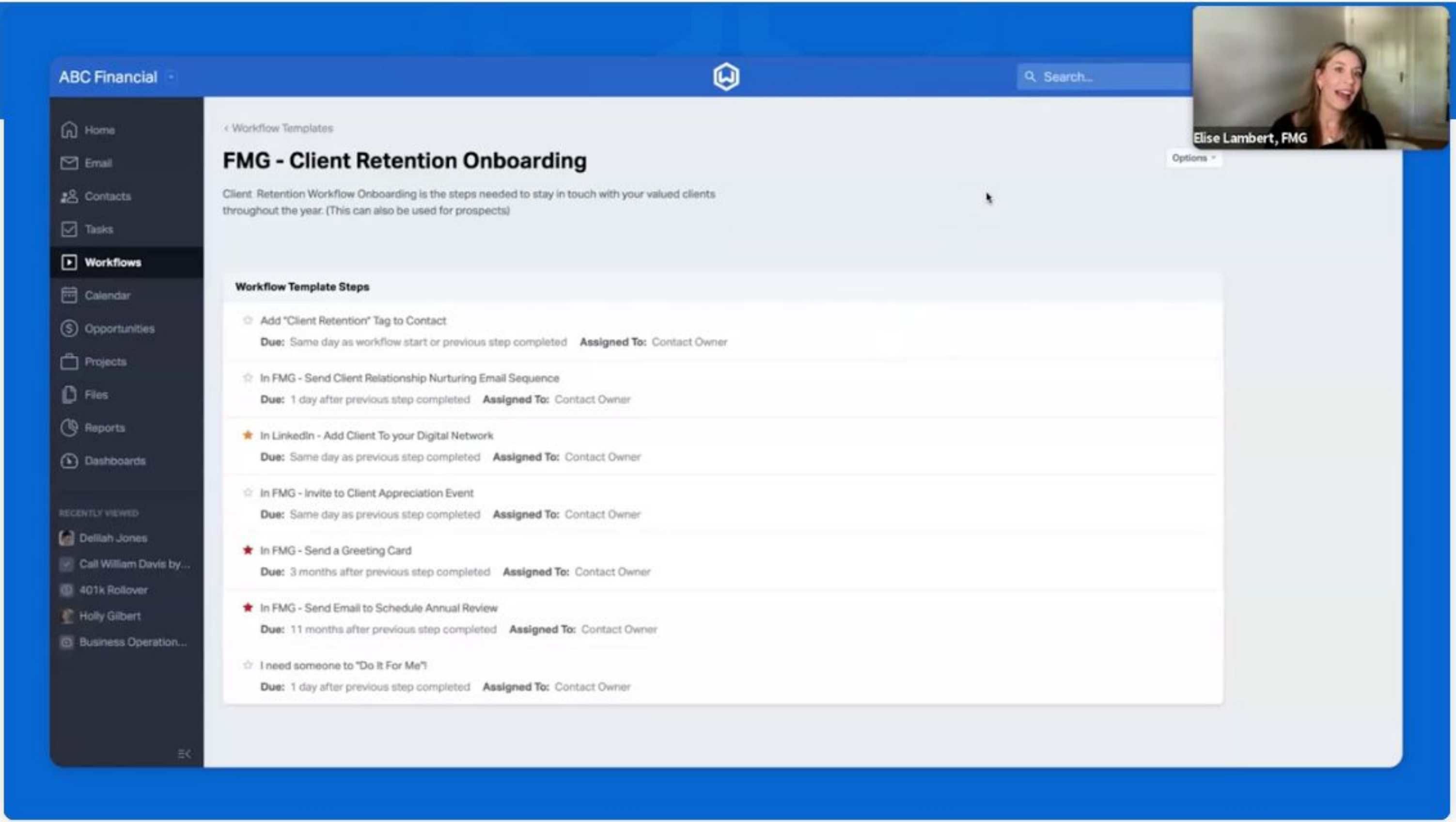
It's official: we're a team! You took a big step by connecting with us, and we're thrilled to help you go after your financial goals.

Life can move in unexpected ways. In addition to our regular check-ins, we hope you'll reach out when you experience twists or surprises. The more we know about your world, the better we can fine-tune our advice for you.

Remember, you're not alone. Please don't hesitate to reach out with

Close

Use Sequence



Presented by

Wealthbox + fmg

Ways to Personalize the New Client Welcome Sequence Series

Get Social

Invite your new clients to follow you on your Linkedin and Social Business Pages

Use Video

Add a video that introduces your team and staff

Multimedia

Add value, send an eBook from the FMG Library

Podcast or Youtube

If applicable, invite them to follow your podcast or YouTube page!

Philanthropy

Talk about organizations near and dear to your firm and what you do in the community!

Chief Roll Over Officer

Introduce your four-legged Chief RollOver Officer

Best Practices for Effective Appointment Reminders

Integrate with Scheduling Software

Find a reminder solution that seamlessly integrates with your online scheduling software to ensure timely and accurate booking confirmations and reminders.

Offer Multiple Reminder Channels

Provide clients with the option to receive reminders via text, email, or phone calls to cater to their preferred communication method.

Send Timely Reminders

Schedule reminders at strategic times, such as a few days or a week before the appointment, to maximize their effectiveness.

Communicate Cancellation Policy?

- Cancellation Window
- Cancellation Fee
- Holiday Adjustments

Provide Call to Action

Always include a clear call to action, such as confirming or rescheduling the appointment, to make it easy for clients to respond.

Additional tips for enhancing the onboarding process:

Use of Technology for Seamless Onboarding:

- Client Logins on Website
- E-signature tools for easy paperwork
- CRM systems for tracking client interactions
- Approved Texting Platform ie: MyRep Chat

Offering Educational Resources:

- Webinars on financial topics
- Articles and blog posts
- Access to financial planning tools

Soliciting Feedback to Continuously Improve the Process:

- Post-onboarding surveys
- Regular feedback sessions
- Implementing client suggestions

When advisors send an approved text message to follow up on paperwork requests previously sent by email, they often see documents completed and returned within 5 minutes.

(MyRepChat, Internal Data 2024)

Want to learn more?

Book a time to talk with us →

Meet With Us: https://fmgsuite.com/get-a-demo

Questions? Marketing@fmgsuite.com

We’re here to help.

Content Planning

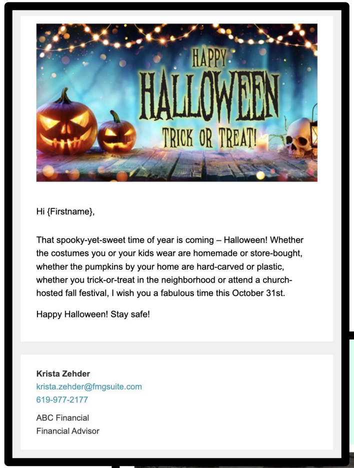
Holidays/Observances

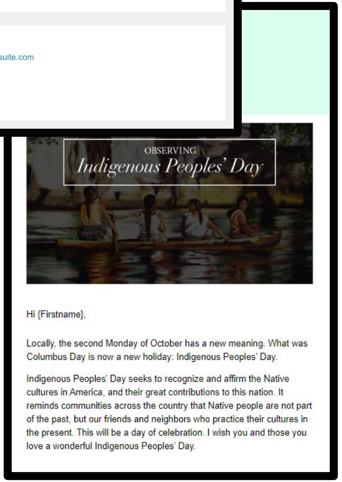
October

- Halloween
  (Email, Card & Social)
- Indigenous Peoples' Day
  (Email & Social)
- Rosh Hashanah
  (Email, Card & Social)

Greeting Card

Email

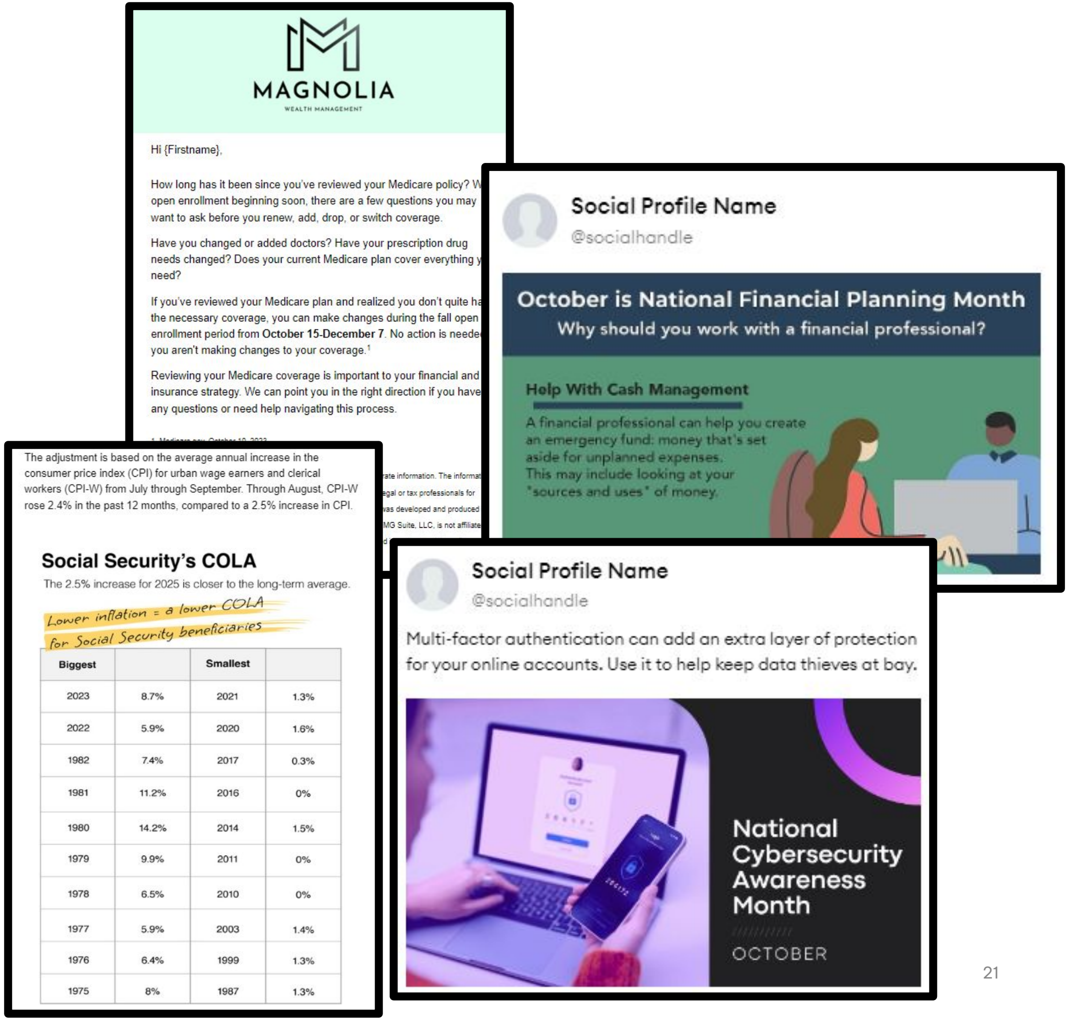




Content Planning

October is the Month of:

- Medicare Open Enrollment (Email & Social)
- National Financial Planning (Email & Social)
- Cyber Security Awareness (Email & Social)
- Social Security COLA Release (Email)



Biggest		Smallest	
2023	8.7%	2021	1.3%
2022	5.9%	2020	1.6%
1982	7.4%	2017	0.3%
1981	11.2%	2016	0%
1980	14.2%	2014	1.5%
1979	9.9%	2011	0%
1978	6.5%	2010	0%
1977	5.9%	2003	1.4%
1976	6.4%	1999	1.3%
1975	8%	1987	1.3%

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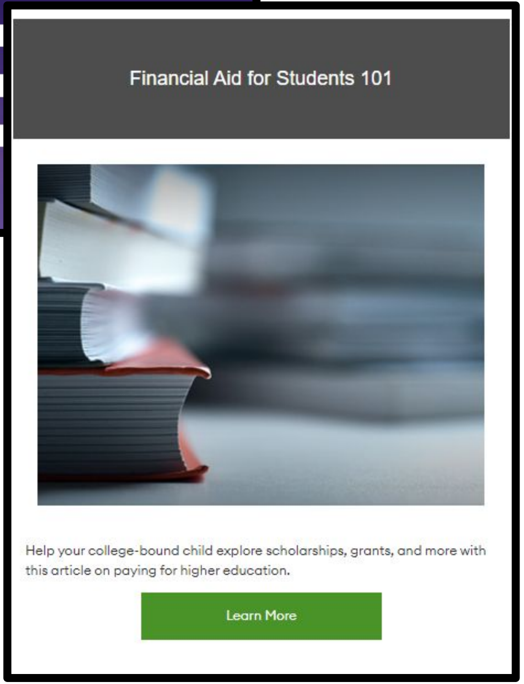
Content Planning

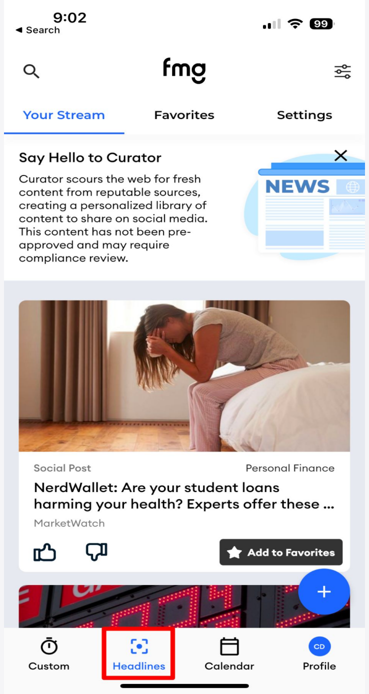
More October content themes to consider:

- FAFSA Applications Open
  (Social)

- Secure Act 2.0
  (Lead generating landing page)

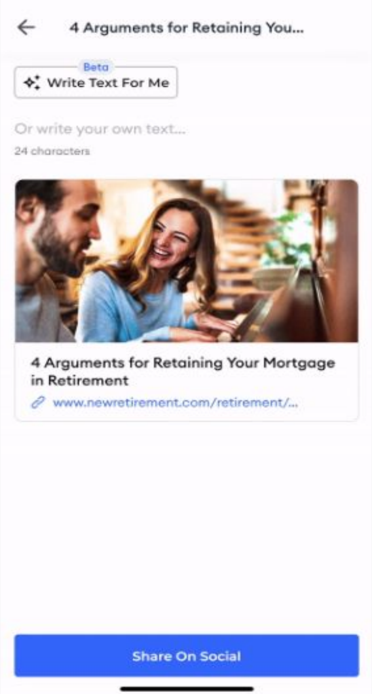


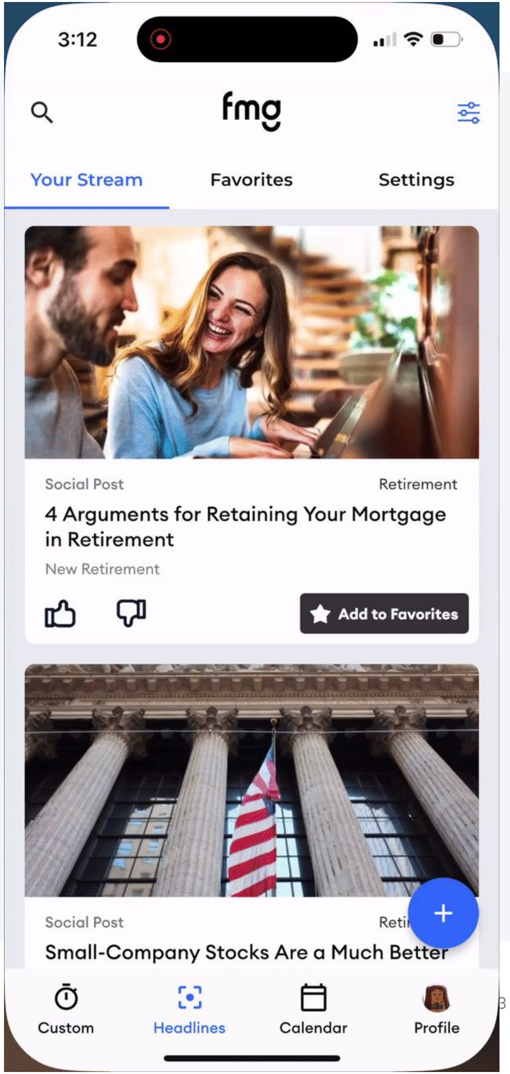
Browse and Choose Your Content



Add Your Caption

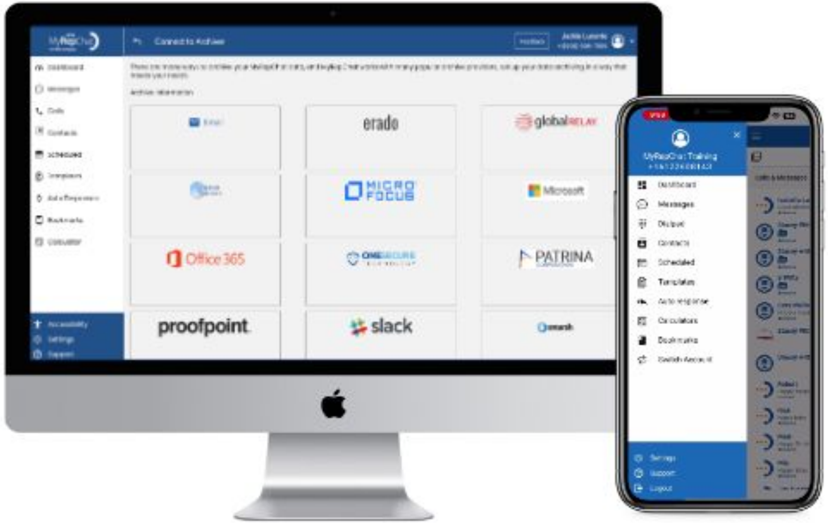
- Write Your Own Text
- Write Text For Me





We're better **together.**

MyRepChat
An FMG Company



Text and email are a strong marketing pair for financial advisors to contact clients directly while following regulations. Discover **MyRepChat**, a compliant text messaging platform that enhances and streamlines business communication*.

Text-Messaging - Fast Facts:

- 98% open rate
- Read rate within three minutes of delivery
- An average person in the US only completes six phone calls per day, but sends or receives 32 texts

Scan QR code to request a Demo

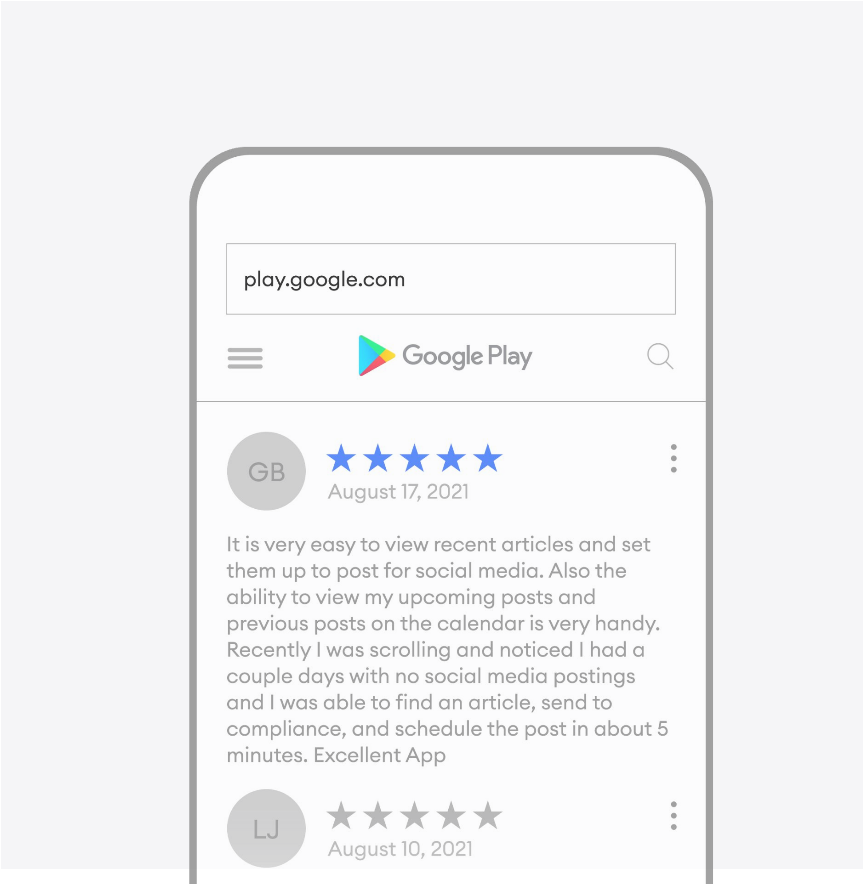
Statistic Sources: Business Wire, 99Firms

Contact your Broker-Dealer to see if your firm supports MyRepChat for compliant texting.

Download the FMG App!

Download on the App Store

GET IT ON Google Play



Today’s Giveaways 🥳

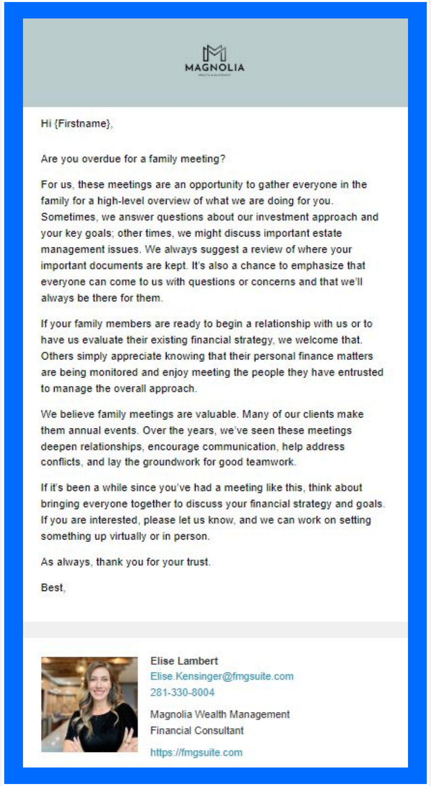
Today's Content Giveaway

Thank you for attending!

You will receive a FREE Do It For Me Email

DO IT FOR ME EXCLUSIVE:

Family Meeting Email



MAGNOLIA

Hi {Firstname},

Are you overdue for a family meeting?

For us, these meetings are an opportunity to gather everyone in the family for a high-level overview of what we are doing for you. Sometimes, we answer questions about our investment approach and your key goals; other times, we might discuss important estate management issues. We always suggest a review of where your important documents are kept. It's also a chance to emphasize that everyone can come to us with questions or concerns and that we'll always be there for them.

If your family members are ready to begin a relationship with us or to have us evaluate their existing financial strategy, we welcome that. Others simply appreciate knowing that their personal finance matters are being monitored and enjoy meeting the people they have entrusted to manage the overall approach.

We believe family meetings are valuable. Many of our clients make them annual events. Over the years, we've seen these meetings deepen relationships, encourage communication, help address conflicts, and lay the groundwork for good teamwork.

If it's been a while since you've had a meeting like this, think about bringing everyone together to discuss your financial strategy and goals. If you are interested, please let us know, and we can work on setting something up virtually or in person.

As always, thank you for your trust.

Best,

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Financial Consultant
https://fmgsuite.com

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- Your own dedicated **Marketing Concierge**
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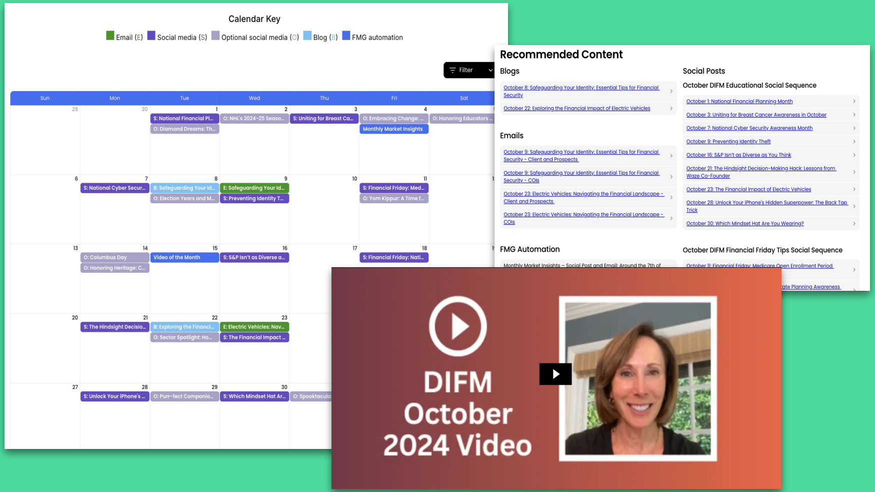
- Take the **heavy lifting off** your plate
- **5-star content exclusively written** by Sam & Susan

Samantha Russell
Chief Evangelist, FMG

Susan Theder
CMO/CXO, FMG



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Q&A