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The First 90 Days—  
Turn **New Clients** Into  
**Raving Fans**



HAPPENING **LIVE!**



# What We'll Discuss

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1. Launch a repeatable new client welcome series

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2. Reduce questions with newsletters and FAQs

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3. Surveys and check-ins for feedback

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4. Personal touches with events and gifts

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

(Source: Advisor Growth Strategies)

# Content Giveaway

All registrants will receive:

- Building Client Loyalty Guide
- Client Onboarding Communication Checklist

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## The First 90-Days

Turning New Clients into Raving Fans

Actionable ideas to make client onboarding efficient, consistent, and unforgettable.

This guide is designed to help financial advisors enhance their client onboarding process. Every office runs differently – so use these ideas to fill in any gaps, streamline your process, and uncover new ways to elevate the client experience.

**SETTING THE STAGE**

### Before the First Meeting

The foundation of a great client relationship starts before you ever meet. Use expectations, answer common questions proactively, and create a seamless new clients they've made the right choice.

**Create a Welcome Email Series**

Create a welcome email series to introduce your firm, answer questions, and the following content ideas:

- **Pre-Meeting Email** – Send a quick reminder about the upcoming appointment how to prepare (e.g., documents, questions).
- **FAQ Email** – Answer common new-client questions and link to your FAQ page for easy reference.
- **Welcome eNewsletter** – Create a short email newsletter that speaks directly to information your new client should know at this stage. Include visuals like custom graphics (Canva is a great option). Some ideas:
  - What to expect
  - About your team and who to contact
  - Client portal information
  - Billing and statements
  - Link to your FAQ page on your website
  - Share a relevant blog post
- **FAQ Email** – Answer common new-client questions and link to your FAQ page for easy reference.

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## New Client Onboarding Checklist: The First 90-Days

**Before the First Meeting**

- Create **new client welcome emails**.
- Send a **meeting reminder email** with key details and what to expect (e.g., first meeting checklist).
- Send a **meeting reminder text**.
- Record **onboarding videos**.
- Create and send a custom **welcome email** (add “what to expect” video).
- Update the **FAQ page** on your website.
- Prepare a **welcome kit** with key collateral (e.g., intro letter, team contacts, process overview, access instructions, and required documents).
- Prepare a **welcome gift**.
- Send a **social media connection request** (on approved platforms: LinkedIn, Facebook, Instagram).
- Update your **CRM**. Assign new clients to relevant groups (e.g., client tier, investing stage, niche segment). Enter any known key data points: birthday, spouse/partner, mailing address, referral source.

**During the First Meeting**

- Deliver the **welcome kit**.
- Deliver the **welcome gift**.
- Provide an **office tour** or a virtual welcome.
- Take **detailed notes** on goals, communication preferences, personal details, and key milestones.
- Review your **client experience** - process and set expectations.
- Share and have your client complete a **new client survey**.
- Schedule the **next meeting** before ending the appointment.

# Creating Raving Fans

- Raving Fans - by Ken Blanchard
- Prioritize Customer Service
- Happy Clients > Brand Advocates

New customer acquisition costs have **increased by almost 50%** in the past five years.

- [Hubspot](#)

Research found that existing customers are **50% more likely to try new products** and **spend 31% more**, on average, compared to new customers.

- [Forbes](#)

# How Does This Improve Client Longevity?

## ● Onboarding

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

## ● Personalized Experience

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

## ● Continuous Improvement

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

## ● Client Satisfaction

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

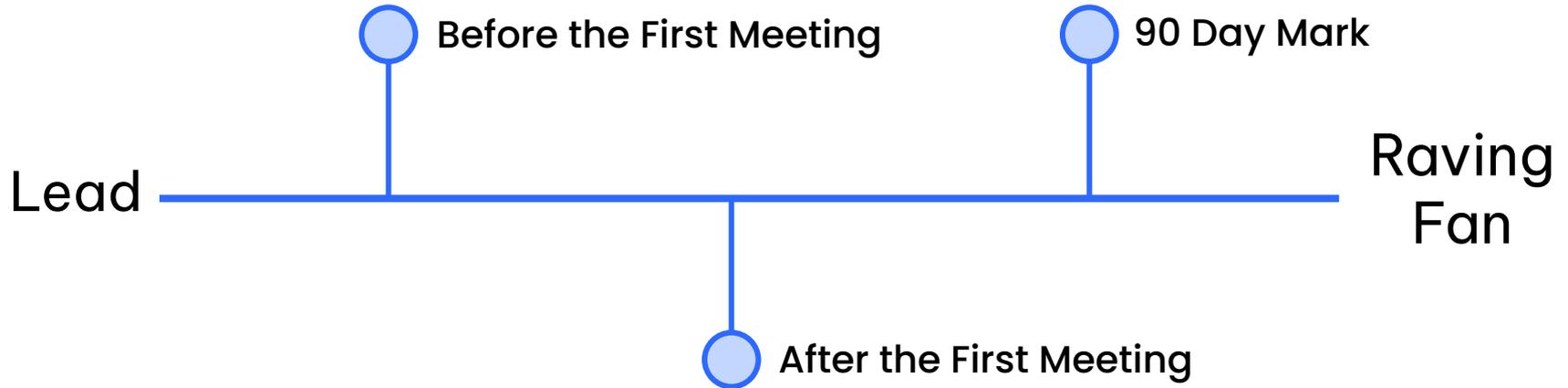
## ● Proactive Communication

Maintaining open and transparent communication builds trust and confidence.

## ● Loyalty

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

# Client Onboarding - First 90 Days



# Explore The Content Library

Q New Client

- Explore All
- Web Content
- Emails
- Social Posts
- Greeting Cards
- Downloadables
- Curator

## Collections



**Exclusive Content**  
Exclusive Access! Timely, engaging content



**Instagram Content Drop For October**



NEW AND NOTABLE

**Timely Content**  
The newest and most relevant pieces from

Search **"New Client"** in the Content Library

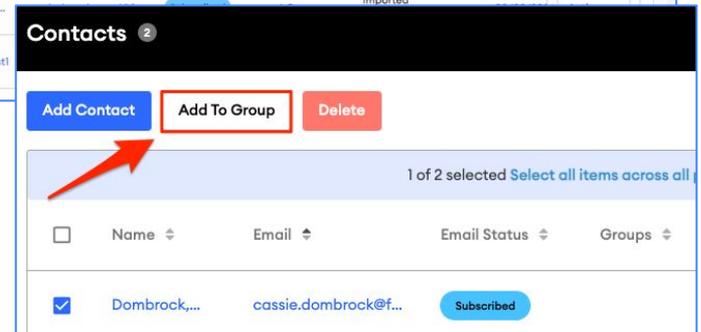
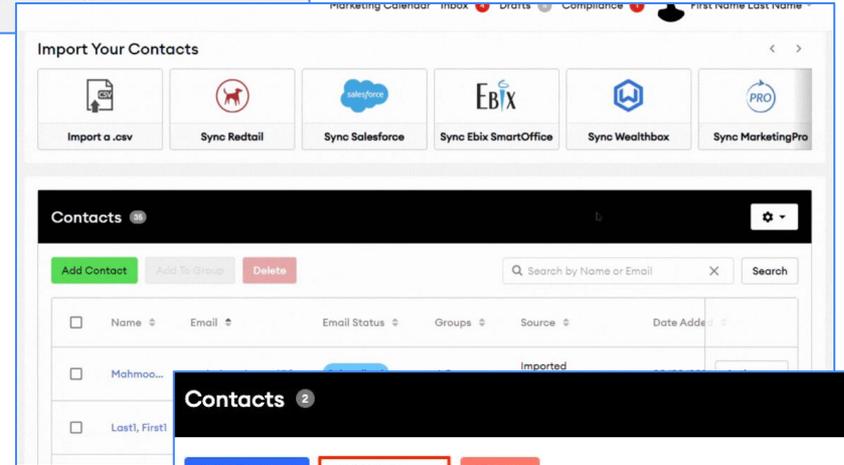
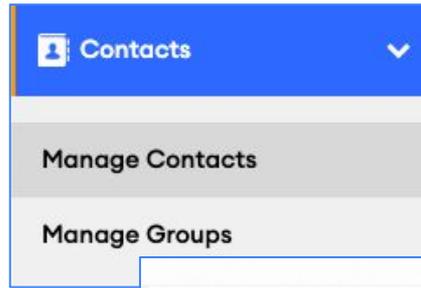
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# Before the First Meeting

# Everything starts with your CRM!

- Add Contact to CRM
- Add to Groups/Tags



# Pre-Meeting Content Ideas

- **Pre-Meeting Email**

Send a quick reminder about the upcoming appointment, what to bring, and how to prepare (e.g., documents, questions, portal access).

- **FAQ Email**

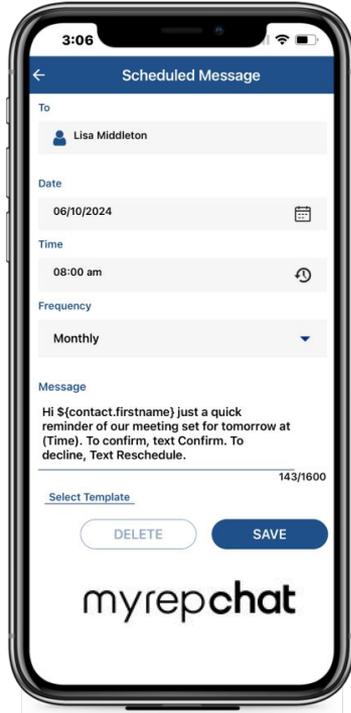
Use the Custom Email Builder to answer common new-client questions and link to your FAQ page for easy reference.

- **Welcome eNewsletter**

Use the Custom Email Builder to create a short email newsletter that speaks directly to the top 5 things they should know. Include visuals like videos, team photos, or custom-created Canva graphics.

# Appointment Reminder Email

\*This could also be automated if you use a meeting scheduler like Calendly or Bookings



Hi there!

We're looking forward to seeing you for your appointment, which is coming up soon. Every meeting is a chance for us to learn more about your goals, and find ways to support you as you pursue them.

In this upcoming meeting, we'll look over your financial landscape, and discuss any questions or concerns you may have. Please make sure to bring with you any paperwork or other material that might be helpful to us in this conversation.

If you need to reschedule, please let us know at your earliest convenience.

See you soon!



## New Client Welcome Message



### 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 Sequence

Customize this pre-built sequence to match your brand and voice!

- Available for all marketing subscriptions!

**New Client Welcome Sequence** 4 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 Greeting Financial  
Feedback Communication  
Strategy Onboarding  
Relationship  
Financial Statements  
New Clients

**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

# 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

# Client Onboarding Videos

Ideas

- **Welcome to Our Firm**
- **Meet the Team**
- **What to Expect Next**
- **How to Access the Client Portal**



Check out our video partner,  
**Idea Decanter**

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## Client Onboarding Videos

Video is one of the most powerful ways to connect with new clients and make the onboarding experience feel personal, simple, and professional. Aim for 1–5 minutes per video to keep attention high and messages clear. Think of this series as a chance to put a face to your brand—show your warmth, expertise, and personality. Video builds familiarity and trust, helping clients feel at ease. The suggested lineup is below.

### Welcome to Our Firm

Create a warm, personal introduction that helps new clients feel confident they've made the right choice.

#### Content Focus:

- A brief "thank you" for becoming a client
- A quick intro to who you are and your firm's mission
- What clients can expect next
- Reassurance that they have a trusted team supporting them

**Tone:** Friendly, approachable, confident

### Meet the Team

Put faces to names and clarify who does what — making the firm accessible and personal.

#### Content Focus:

- Introduce key team members and their roles — e.g., advisor, analyst, and financial planning
- Explain when each person may reach out or how to reach them
- Emphasize collaboration and responsiveness

**Tone:** Personable and team-oriented — think "you're in good hands"

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### What to Expect Next (Onboarding Overview)

Set expectations for the onboarding journey and eliminate confusion about what happens after the first meeting.

#### Content Focus:

- Outline the steps for the first 90 days (e.g., paperwork, next meetings, communications)
- Mention how clients can reach you between meetings
- Encourage them to look out for follow-up emails, FAQs, or onboarding materials
- If applicable, briefly highlight the client portal or any digital tools

**Tone:** Clear, reassuring, organized

### How to Access and Use the Client Portal

Demystify technology and empower clients to navigate their accounts easily.

#### Content Focus:

- How to log in
- What they can view or update
- How to find performance reports, statements, and resources
- How to reach the team for technical support

**Tone:** Supportive and instructional

**Pro Tip:** Upload and share your videos directly through FMG — easily embed them in emails, showcase them on your website, or post them to social media to boost reach.

**Need help using your marketing tools?**

Contact FMG's customer support team at 858-251-2420.

www.fmg.com 858-251-2420

## Before the First Meeting

- Create/customize/save **onboarding email templates and sequences** (outlined in this checklist) for easy sending in the near future. ●●
- Update your CRM.** Assign new clients to relevant groups (e.g., client tier, investing stage, niche segment). Enter any known key data points: birthday, spouse/partner, mailing address, referral source.
- Send a **meeting reminder email** with key details and what to expect (e.g., first meeting checklist). ●●
- Send a **meeting reminder text** via [MyRepChat](#).
- Record **onboarding videos**. (Download [video ideas](#))
- Create and send a custom **welcome email** (add “what to expect” video).●
- Prepare a **welcome kit** with key collateral (e.g., intro letter, team contacts, process overview, access instructions, and required documents).
- Prepare a **welcome gift**.
- Send a **social media connection request** (on approved platforms: LinkedIn, Facebook, Instagram).

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# During the First Meeting

## During the First Meeting

- Deliver **welcome kit**.
- Deliver **welcome gift**.
- Provide an **office tour** or a virtual welcome.
- Take **detailed notes** on goals, communication preferences, personal details, and key milestones.
- Review your **client experience** - process and set expectations.
- Share and have your client complete the **new client survey**.  
(Download [sample survey](#).)
- Schedule the next meeting** before ending the appointment.



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# After the First Meeting

# Update CRM

(add/update contact to applicable groups)

# Following Up After an Appointment

Email in the Content Library

## Customization Ideas:

- Link to a FAQ page
- Encourage them to follow you on social media
- Provide client portal details
- Video about next steps
- Introduction to other services provided
- New client survey



Hi {Firstname},

Thank you for making time to meet with us. It was great to see you and hear more about your current needs and goals.

If there's anything else I can help you with, or if you have some follow-up questions that come to mind, please feel free to reach out to me anytime.

I look forward to being in touch with you again soon.

# FAQ Example on an FMG Website

FAQ pages are great way to boost AEO

**Galli Financial**  
GOOD TO GROW

About Resource Center Tools Events **Contact**

## FAQs

### What Should I Consider When Choosing A Financial Professional?

When selecting a financial professional, there are many key factors to consider, including evaluating their qualifications, investment approach, accessibility, and professional network that can help you pursue your financial goals.

**Key Considerations:**

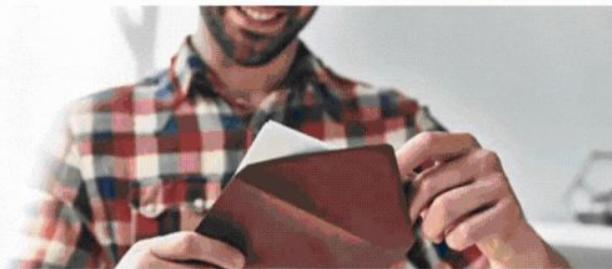
You are viewing a preview location.

BrokerCheck by FINRA

- Email >
- Social >
- Events >
- SETTINGS
- Profile >
- Contacts >
- EXTRAS
- 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



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# 90+ Days

# Keep the conversation going...

- Host an event
- Turn on marketing automations
- Send client satisfaction survey
- Book meetings in advance
- Request a testimonial (if permitted)

## We'd love to hear your feedback.

It's been a pleasure getting to know you over the past few months. Your input helps us refine our process and deliver an experience that supports your goals.

### How satisfied are you with your experience with us so far?

- Very satisfied
- Satisfied
- Neutral
- Unsatisfied
- Very unsatisfied

### Do you feel our communication—meetings, emails, updates—has been clear and timely?

- Always
- Most of the time
- Sometimes
- Rarely

### Which of the following have been most valuable to you so far?

#### Select all that apply:

- Market update emails or videos
- Financial planning advice/strategy meetings
- Educational resources (checklists, eBooks, webinars)
- Personalized portfolio insights
- Other (please specify):

### What could we do better to enhance your experience?

To: \_\_\_\_\_  
From: \_\_\_\_\_



You're invited  
to a client  
appreciation event

When \_\_\_\_\_  
Where \_\_\_\_\_

RSVP

- Add contacts 
- Invitation goes out 
- Landing page with registration form is created 
- Registrations are collected 
- A social post gets triggered 
- A reminder email sent the day before the event 
- Event is a success! 

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**Demo**

# Recommended Content: November

# 10-Minute Marketing Calendar

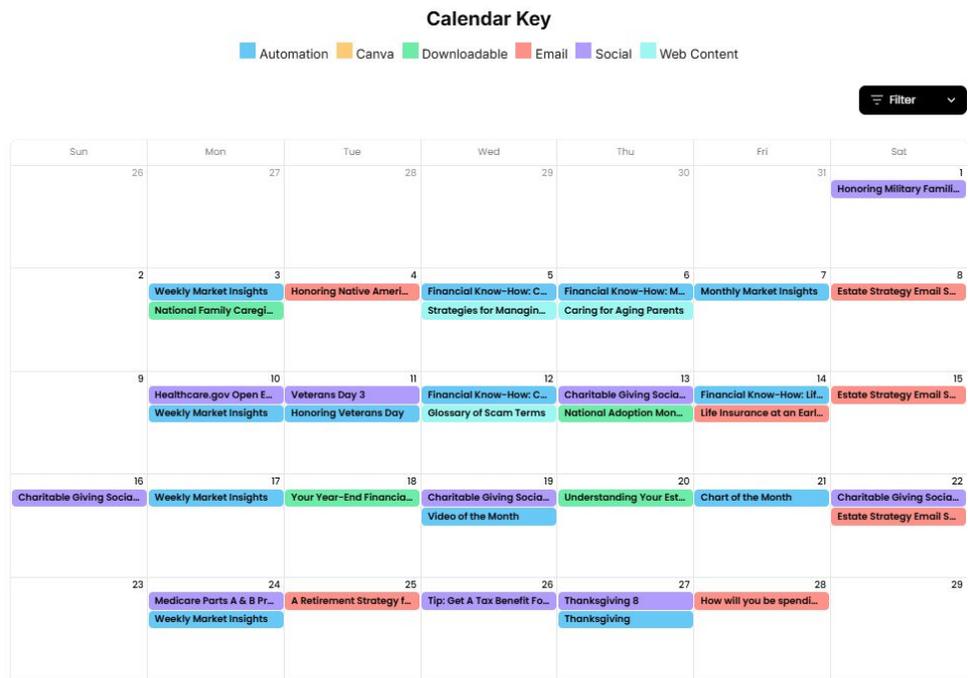
Suggested content and direct links to easily find and use recommended content

Includes content recommendations for:

- Email marketing
- Automation marketing
- Social posts
- Downloadables
- And new Canva templates

You can now find it in the Content Library!

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# Content Planning

## Holidays/Observances

- Thanksgiving  
(Email, Social, Instagram)
- Veterans Day  
(Email, Social, Card, Instagram)
- Native American Heritage Month  
(Email Sequence, Social, Social Sequence, Instagram)

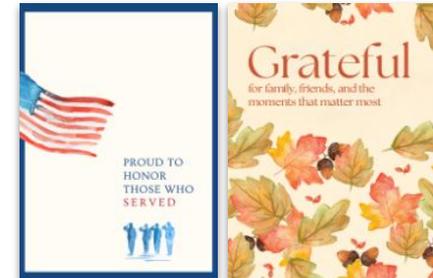
### Email



### Social



### Greeting Card



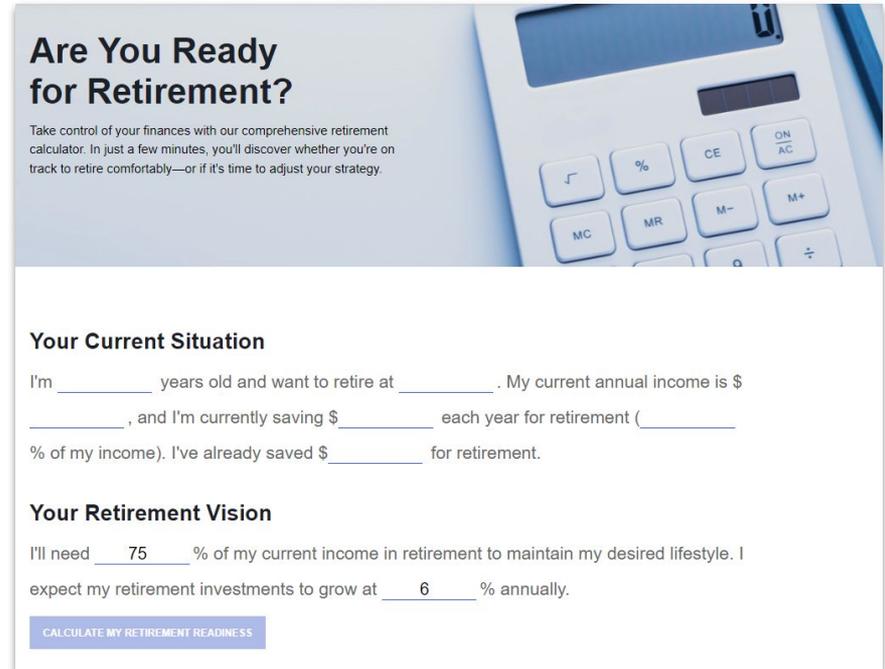
# New Content

## Retirement Income Savings Interactive Calculator

This interactive calculator offers native functionality for easy updates and an intuitive user experience.

It can be shared directly with prospects and clients, helping drive lead generation through personalized narratives and a unique, shareable URL.

Coming Soon!



### Are You Ready for Retirement?

Take control of your finances with our comprehensive retirement calculator. In just a few minutes, you'll discover whether you're on track to retire comfortably—or if it's time to adjust your strategy.

**Your Current Situation**

I'm \_\_\_\_\_ years old and want to retire at \_\_\_\_\_. My current annual income is \$ \_\_\_\_\_, and I'm currently saving \$ \_\_\_\_\_ each year for retirement ( \_\_\_\_\_ % of my income). I've already saved \$ \_\_\_\_\_ for retirement.

**Your Retirement Vision**

I'll need 75 % of my current income in retirement to maintain my desired lifestyle. I expect my retirement investments to grow at 6 % annually.

[CALCULATE MY RETIREMENT READINESS](#)



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# **Elevate Your Marketing for an Impactful 2026**

# An award-winning marketing suite. Built just for you.



Our expertise is **showing off yours.**



Want to learn more?  
**Book a 20-minute consult** →

Questions? [Marketing@fmgsuite.com](mailto:Marketing@fmgsuite.com)

