




























- Records
- Workspace
- Incomplete
- Actions
- Opportunities
- Accounts
- Insurance
- Correspondance & Documents
- Reports
- Dashboards

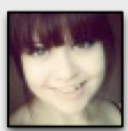
Records Workspace

Record	Primary Phone	Business Phone	Primary Advisor	Secondary Advisor	Last Contacted	Company	Assets Under Management	Classification
 Kerr Family	 (919) 285-1298	 (919) 285-1255	Alexandra B. Gould	Peter K. Burton	05/15/2012	Ruby's Pub	\$475,000.00	Client
 Suarez 401k Plan	 (910) 445-7854	 (910) 445-7855	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$230,000.00	Client
 Workman Family	 (252) 732-4566	 (252) 732-4455	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$786,254.00	Client
 Poole Family	 (252) 874-6586	 (252) 874-6555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$130,234.00	Client
Valenzuela and Associates	 (910) 665-4567	 (910) 665-4555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$987,772.00	Client
 Heath, Inc.	 (910) 362-3326	 (910) 362-3355	Alexandra B. Gould	Peter K. Burton	05/25/2012		\$5,938,221.00	Client
 Cakewalk	 (866) 532-0245	 (866) 532-0255	Peter K. Burton	Alexandra B. Gould	05/25/2012	Heath, Inc.	\$230,000.00	Client
 Stephanie R. Santana	 (919) 447-9586	 (919) 447-9555	Peter K. Burton	Alexandra B. Gould	04/25/2012		\$221,199.00	Client
Indira P. Henson	 (919) 789-4421	 (919) 789-4455	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$334,998.00	Client
 Wanda K. Schroeder	 (252) 496-2351	 (252) 496-2355	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$198,873.00	Client




Found 10 Activities View

20

 Per Page Page 1



Kerr Family
[Mrs. Rubyjonsky \(Ruby\) S. Kerr](#)
Birthday: 02/21/1981 (31)
[Mr. Kevin Kerr](#)
Birthday: 02/21/1971 (41)

Primary Phone
 [\(919\) 285-1298](#)
Business Phone
 [\(919\) 285-1255](#)
Email
 rskerr@gmail.com
Mailing Address
667 Nunc. Rd.
Springfield, FL 99999

Recent Actions
[Phone](#) 05/10/2012
[Email](#) 05/01/2012
[Meeting](#) 04/28/2012

Advisors
Alexandra B. Gould
Peter K. Burton
CSR
Kessie C. Ashley

Tags
[Holiday Gift](#) [Newsletter](#)
[Interests: Automobiles](#) [Interests: Travel](#)
[Interests: Computers](#) [Interests: Music](#)



Records

Workspace

Incomplete

Actions

Opportunities

Accounts

Insurance

Correspondance & Documents

Reports

Dashboards

Selected Record

Actions

Phone Call

Fax

Letter

401k Rollover

New Record

Search

Imports

Actions

New Action

Email

Entered By

Entered On

Assigned To

Priority

Type

Date Due

Category

Time Spent

Subject

Alert

Complete or No further action required

Repeat Action

Exclude from History

Attachment

Goal

Associate

Insurance

Account

Tag

Follow

Save and

Continue

Clone

Close

or Cancel

Preview

Email

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

Kerr Family
Mrs. Rubyjonsky (Ruby) S. Kerr
Birthday: 02/21/1981 (31)
Mr. Kevin Kerr
Birthday: 02/21/1971 (41)

Primary Phone

(919) 285-1298

Business Phone

(919) 285-1255

Email

rskerr@gmail.com

Mailing Address

667 Nunc. Rd.
Springfield, FL 99999

Recent Actions

Phone 05/10/2012

Email 05/01/2012

Meeting 04/28/2012

Advisors

Alexandra B. Gould

Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles


Interests: Travel

Interests: Computers

Interests: Music



Action 123456 Detail



Kerr Family

[Mrs. Rubyjonsky \(Ruby\) S. Kerr](#)

Birthday: 02/21/1981 (31)

[Mr. Kevin Kerr](#)

Birthday: 02/21/1971 (41)

Primary Phone

[\(919\) 285-1298](#)

Business Phone

[\(919\) 285-1255](#)

Email

rskerr@gmail.com

Recent Actions

Phone

05/10/2012

Email

05/01/2012

Meeting

04/28/2012

Advisors

Alexandra B. Gould
Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Email

View by Actions

Entered By

Shawn Ethridge

Entered On

05/15/2012

Assigned To

Chris Jarvis

Priority

Normal

Type

Email

Date Due

05/19/2012

Category

Please Choose...

Time Spent

0 Minutes

Summary

Email the prospect directions to the office.

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

[Add User](#)

Complete or No further action required

☐

Repeat Action

☒

starting Today

every 2 Weeks

from Last Action

ending Never

Exclude from History




























☐

Add Action

Add: [Note](#) [Letter](#) [Service](#) [Meeting](#) [Goal](#) [Associate](#) [Insurance](#) [Account](#) [Tag](#) [Follow](#)

- Records
- Workspace
- Incomplete
- Actions
- Opportunities
- Accounts
- Insurance
- Correspondance & Documents
- Reports
- Dashboards

Records Workspace

Record	Primary Phone	Business Phone	Primary Advisor	Secondary Advisor	Last Contacted	Company	Assets Under Management	Classification
 Kerr Family	 (919) 285-1298	 (919) 285-1255	Alexandra B. Gould	Peter K. Burton	05/15/2012	Ruby's Pub	\$475,000.00	Client
 Suarez 401k Plan	 (910) 445-7854	 (910) 445-7855	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$230,000.00	Client
 Workman Family	 (252) 732-4566	 (252) 732-4455	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$786,254.00	Client
 Poole Family	 (252) 874-6586	 (252) 874-6555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$130,234.00	Client
Valenzuela and Associates	 (910) 665-4567	 (910) 665-4555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$987,772.00	Client
 Heath, Inc.	 (910) 362-3326	 (910) 362-3355	Alexandra B. Gould	Peter K. Burton	05/25/2012		\$5,938,221.00	Client
 Cakewalk	 (866) 532-0245	 (866) 532-0255	Peter K. Burton	Alexandra B. Gould	05/25/2012	Heath, Inc.	\$230,000.00	Client
 Stephanie R. Santana	 (919) 447-9586	 (919) 447-9555	Peter K. Burton	Alexandra B. Gould	04/25/2012		\$221,199.00	Client
Indira P. Henson	 (919) 789-4421	 (919) 789-4455	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$334,998.00	Client
 Wanda K. Schroeder	 (252) 496-2351	 (252) 496-2355	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$198,873.00	Client

Found 10 Activities View

20

 Per Page Page 1

- C
- Actions
- Email
- Phone Call
- Fax
- Letter
- 401k Rollover
- Approach Meeting

Log an email either to or from one of the contacts associated with the selected record.




D

- View by
- Record Name
- Primary Contact
- Classification
- Primary Advisor
- Secondary Advisor
- Assets Under Management

A



Kerr Family
Mrs. Rubyjonsky (Ruby) S. Kerr
Birthday: 02/21/1981 (31)
Mr. Kevin Kerr
Birthday: 02/21/1971 (41)

Primary Phone
 [\(919\) 285-1298](#)
Business Phone
 [\(919\) 285-1255](#)
Email
 rskerr@gmail.com
Mailing Address
667 Nunc. Rd.
Springfield, FL 99999

Recent Actions
[Phone](#) 05/10/2012
[Email](#) 05/01/2012
[Meeting](#) 04/28/2012

Advisors
Alexandra B. Gould
Peter K. Burton
CSR
Kessie C. Ashley

- Tags**
- Holiday Gift
- Newsletter
- Interests: Automobiles
- Interests: Travel
- Interests: Computers
- Interests: Music



Records

Workspace

Incomplete

Actions

Opportunities

Accounts

Insurance

Correspondance & Documents

Reports

Dashboards

Selected Record

Actions

Reports

New Record

Search

Imports

Actions

Log an email either to or from one of the contacts associated with the selected record.

New Action

Approach Meeting

A

Entered By

Please Choose...

Entered On

__ / __ / __

Assigned To

Please Choose...

Priority

Please Choose...

Type

Meeting

Date Due

__ / __ / __

Category

Please Choose...

Time Spent

0 Minutes

Subject

enter text

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

Add User

Complete or No further action required

Repeat Action

starting Today

every 2 Weeks

from Last Action

ending Never

Exclude from History

Attachment

Goal

Associate

Insurance

Account

Tag

Follow

Save and

Continue

Clone

Close

or Cancel

Preview

Phone

Note

Meeting

Note

Letter

Meeting

Letter

Meeting

Letter

Note

Service

Service

B

C

er Management

Classification

\$475,000.00	Client
\$230,000.00	Client
\$786,254.00	Client
\$130,234.00	Client
\$987,772.00	Client
\$5,938,221.00	Client
\$230,000.00	Client
\$221,199.00	Client
\$334,998.00	Client
\$198,873.00	Client

Kerr Family

Mrs. Rubyjonsky (Ruby) S. Kerr

Birthday: 02/21/1981 (31)

Mr. Kevin Kerr

Birthday: 02/21/1971 (41)

Primary Phone

(919) 285-1298

Business Phone

(919) 285-1255

Email

rskerr@gmail.com

Mailing Address

667 Nunc. Rd.

Springfield, FL 99999

Recent Actions

Phone	05/10/2012
Email	05/01/2012
Meeting	04/28/2012

Advisors

Alexandra B. Gould

Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles


Interests: Travel

Interests: Computers

Interests: Music



Action 123456 Detail



Kerr Family
Mrs. Rubyjonsky (Ruby) S. Kerr
Birthday: 02/21/1981 (31)
Mr. Kevin Kerr
Birthday: 02/21/1971 (41)

Primary Phone
(919) 285-1298

Business Phone
(919) 285-1255

Email
rskerr@gmail.com

Recent Actions
Phone 05/10/2012
Email 05/01/2012
Meeting 04/28/2012

Advisors
Alexandra B. Gould
Peter K. Burton
CSR
Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Phone

View by Actions

Entered By
Shawn Ethridge

Entered On
05/15/2012

Assigned To
Chris Jarvis

Priority
Normal

Type
Phone Call

Date Due
05/19/2012

Category
Please Choose...

Time Spent
0 Minutes

Subject

Call the prospect to confirm the Approach Meeting the day before and make sure the prospect has directions to the office.

☒ Complete or No further action required
☐ Repeat Action
☐ Exclude from History

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

Add User

Action Summary

Phone

Notes

Meeting

Note

Letter

Meeting

Letter

Meeting

Letter

Note

Service

Service

Tags

Directions

Meeting

Service Call

A

Completed Action

Action is not yet available

Add Action

Add: Note Letter Service Meeting Goal Associate Insurance Account Tag Follow

Note - Prospect meeting tomorrow.

Meeting

Summary

Tags

Entered By
Shawn Ethridge

Entered On
05/15/2012

Assigned To
Chris Jarvis

Priority
Normal

Type
Email

Date Due
05/19/2012

Category
Please Choose...

Time Spent
0 Minutes

Subject

Call the prospect to confirm the Approach Meeting the day before and make sure the prospect has directions to the office.

☐ Complete or No further action required
☐ Repeat Action
☐ Exclude from History

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

Add User

Add Action

Add: Note Letter Service Meeting Goal Associate Insurance Account Tag Follow

Note - Approach Meeting with ?, Referred by ?.

HOW CAN WE HELP?
FAMILY

Note - Create Worldox profile for prospect. Add Worldox code to Junxure under Personal Info > Worldox Client Code.

Note - Please give Michelle the following information as soon as possible so she can track the prospect:
1. Type of opportunity (financial planning AND management or either/or)
2. Projected asset value
3. Actual asset value (total net worth, including anything we wouldn't manage)
4. Projected close date
Thank you!

Letter

template in Worldox:
Description: Approach Meeting Thank You Letter Template (STFW DRAFT)
Cabinet: Company
Category: Client
Doc Type: Templates
Sub Type: Misc

Meeting

Ideal Client Scorecard is saved in Worldox under Company Cabinet > Client > Templates > Misc and named "Ideal Client Scorecard".

Letter

If this is a referral send thank you.

Note

Assign CSR and an Advisor to the prospect.

Service

Enter contact and profile information (Classifications: Prospect and Email; and Keywords: In-Planning, Newsletter).





























Service

Mail/email directions to the office with Approach folder (or give Approach folder to the advisor to give to client at Approach Meeting). Approach Folder: business cards, story book, values-based investing fold-out, values (to be printed on thick, glossy bond paper), directions to our office, document check list, Financial Planning and Consulting Agreement, Investment Advisory Agreement, Form ADV Part II, published articles (one of our accomplishments, one by Frank Jones).

Log an email either to or from one of the contacts associated with the selected record.

- Records
- Workspace
- Incomplete
- Actions
- Opportunities
- Accounts
- Insurance
- Correspondance & Documents
- Reports
- Dashboards

Records Workspace

Record	Primary Phone	Business Phone	Primary Advisor	Secondary Advisor	Last Contacted	Company	Assets Under Management	Classification
 Kerr Family	 (919) 285-1298	 (919) 285-1255	Alexandra B. Gould	Peter K. Burton	05/15/2012	Ruby's Pub	\$475,000.00	Client
 Suarez 401k Plan	 (910) 445-7854	 (910) 445-7855	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$230,000.00	Client
 Workman Family	 (252) 732-4566	 (252) 732-4455	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$786,254.00	Client
 Poole Family	 (252) 874-6586	 (252) 874-6555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$130,234.00	Client
Valenzuela and Associates	 (910) 665-4567	 (910) 665-4555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$987,772.00	Client
 Heath, Inc.	 (910) 362-3326	 (910) 362-3355	Alexandra B. Gould	Peter K. Burton	05/25/2012		\$5,938,221.00	Client
 Cakewalk	 (866) 532-0245	 (866) 532-0255	Peter K. Burton	Alexandra B. Gould	05/25/2012	Heath, Inc.	\$230,000.00	Client
 Stephanie R. Santana	 (919) 447-9586	 (919) 447-9555	Peter K. Burton	Alexandra B. Gould	04/25/2012		\$221,199.00	Client
Indira P. Henson	 (919) 789-4421	 (919) 789-4455	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$334,998.00	Client
 Wanda K. Schroeder	 (252) 496-2351	 (252) 496-2355	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$198,873.00	Client

View by

Record Name

Primary Contact

Classification

Primary Advisor


Secondary Advisor

Assets Under Management

Found 10 Activities

View 20 Per Page

Page 1



Kerr Family


[Mrs. Rubyjonsky \(Ruby\) S. Kerr](#)

Birthday: 02/21/1981 (31)


[Mr. Kevin Kerr](#)

Birthday: 02/21/1971 (41)


Primary Phone

 [\(919\) 285-1298](#)

Business Phone

 [\(919\) 285-1255](#)

Email

 [rskerr@gmail.com](#)

Mailing Address

667 Nunc. Rd.
Springfield, FL 99999

Recent Actions

[Phone](#) 05/10/2012

[Email](#) 05/01/2012

[Meeting](#) 04/28/2012

Advisors

[Alexandra B. Gould](#)

[Peter K. Burton](#)

CSR

[Kessie C. Ashley](#)

Tags

[Holiday Gift](#)

[Newsletter](#)

Interests: [Automobiles](#)


Interests: [Travel](#)

Interests: [Computers](#)

Interests: [Music](#)



Action 123456 Detail



Kerr Family


[Mrs. Rubyjonsky \(Ruby\) S. Kerr](#)

Birthday: 02/21/1981 (31)


[Mr. Kevin Kerr](#)

Birthday: 02/21/1971 (41)


Primary Phone

 [\(919\) 285-1298](tel:(919)285-1298)

Business Phone

 [\(919\) 285-1255](tel:(919)285-1255)

Email

 rskerr@gmail.com

Recent Actions

Phone

05/10/2012

Email

05/01/2012

Meeting

04/28/2012

Advisors

Alexandra B. Gould
Peter K. Burton

CSR

Kessie C. Ashley

Tags

^

Holiday Gift

Newsletter

Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Email

View by Actions


Entered By

Shawn Ethridge

▼

Entered On

05/15/2012



Assigned To

Chris Jarvis

▼

Priority

Normal

▼


Type

Email

▼

Date Due

05/19/2012



Category

Please Choose...

▼

Time Spent

0


Minutes

Summary

Email the prospect directions to the office.

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

 [Add User](#)

☐ Complete or No further action required

☒ Repeat Action

starting Today




























 every 2 Weeks from Last Action ending Never

☐ Exclude from History

Log an email either to or from one of the contacts associated with the selected record.

- Records
- Workspace
- Incomplete
- Actions
- Opportunities
- Accounts
- Insurance
- Correspondance & Documents
- Reports
- Dashboards

Records Workspace

Record	Primary Phone	Business Phone	Primary Advisor	Secondary Advisor	Last Contacted	Company	Assets Under Management	Classification
 Kerr Family	 (919) 285-1298	 (919) 285-1255	Alexandra B. Gould	Peter K. Burton	05/15/2012	Ruby's Pub	\$475,000.00	Client
 Suarez 401k Plan	 (910) 445-7854	 (910) 445-7855	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$230,000.00	Client
 Workman Family	 (252) 732-4566	 (252) 732-4455	Alexandra B. Gould	Peter K. Burton	05/15/2012		\$786,254.00	Client
 Poole Family	 (252) 874-6586	 (252) 874-6555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$130,234.00	Client
Valenzuela and Associates	 (910) 665-4567	 (910) 665-4555	Peter K. Burton	Alexandra B. Gould	05/25/2012		\$987,772.00	Client
 Heath, Inc.	 (910) 362-3326	 (910) 362-3355	Alexandra B. Gould	Peter K. Burton	05/25/2012		\$5,938,221.00	Client
 Cakewalk	 (866) 532-0245	 (866) 532-0255	Peter K. Burton	Alexandra B. Gould	05/25/2012	Heath, Inc.	\$230,000.00	Client
 Stephanie R. Santana	 (919) 447-9586	 (919) 447-9555	Peter K. Burton	Alexandra B. Gould	04/25/2012		\$221,199.00	Client
Indira P. Henson	 (919) 789-4421	 (919) 789-4455	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$334,998.00	Client
 Wanda K. Schroeder	 (252) 496-2351	 (252) 496-2355	Alexandra B. Gould	Peter K. Burton	04/28/2012		\$198,873.00	Client

View by

Record Name

Primary Contact

Classification

Primary Advisor

Secondary Advisor

Assets Under Management


Found 10 Activities

View

20

Per Page

Page 1



Kerr Family

[Mrs. Rubyjonsky \(Ruby\) S. Kerr](#)

Birthday: 02/21/1981 (31)


[Mr. Kevin Kerr](#)

Birthday: 02/21/1971 (41)

Primary Phone

 [\(919\) 285-1298](#)

Business Phone

 [\(919\) 285-1255](#)

Email

 [rskerr@gmail.com](#)

Mailing Address

667 Nunc. Rd.
Springfield, FL 99999

Recent Actions

Phone 05/10/2012

Email 05/01/2012

Meeting 04/28/2012

Advisors

Alexandra B. Gould

Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Records

Workspace

Incomplete

Actions

Opportunities

Accounts

Insurance

Correspondance & Documents

Reports

Dashboards

Selected Record

Actions

Reports

New Record

Search

Imports

Actions

Log an email either to or from one of the contacts associated with the selected record.

New Action

Approach Meeting

Entered By

Please Choose...

Entered On

__ / __ / __

Assigned To

Please Choose...

Priority

Please Choose...

Type

Meeting

Date Due

__ / __ / __

Category

Please Choose...

Time Spent

0 Minutes

Subject

enter text

Alert

User	Date Added	Priority	Confirm
Alexandra B. Gould	05/10/2012	Normal	Normal
Peter K. Burton	05/10/2012	Normal	Normal
Kessie C. Ashley	05/10/2012	Normal	Normal

Add User

Complete or No further action required

Repeat Action

starting

Today

every

2 Weeks

from

Last Action

ending

Never

Exclude from History

Attachment

Goal

Associate

Insurance

Account

Tag

Follow

Save and

Continue

Clone

Close

or Cancel

Preview

Phone

Note

Meeting

Note

Letter

Meeting

Letter

Meeting

Letter

Note

Service

Service

Kerr Family

Mrs. Rubyjonsky (Ruby) S. Kerr

Birthday: 02/21/1981 (31)

Mr. Kevin Kerr

Birthday: 02/21/1971 (41)

Primary Phone

(919) 285-1298

Business Phone

(919) 285-1255

Email

rskerr@gmail.com

Mailing Address

667 Nunc. Rd.

Springfield, FL 99999

Recent Actions

Phone 05/10/2012

Email 05/01/2012

Meeting 04/28/2012

Advisors

Alexandra B. Gould

Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter


Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Action 123456 Detail



Kerr Family
Mrs. Rubyjonsky (Ruby) S. Kerr
(Birthday: 02/21/1981 (31))
Mr. Kevin Kerr
(Birthday: 02/21/1971 (41))

Primary Phone
(919) 285-1298

Business Phone
(919) 285-1255

Email
rkerr@gmail.com

Recent Actions

Phone

05/10/2012

Email

05/01/2012

Meeting

04/28/2012

Advisors

Alexandra B. Gould

Peter K. Burton

CSR

Kessie C. Ashley

Tags

Holiday Gift

Newsletter

Interests: Automobiles

Interests: Travel

Interests: Computers

Interests: Music

Phone

View by Actions

Entered By

Entered On

Assigned To

Priority

Type

Date Due

Category

Time Spent

Subject

Alert

Complete or No further action required

Repeat Action

Exclude from History

Action Summary

Tags

Add Action

Add: Note Letter Service Meeting Goal Associate Insurance Account Tag Follow

Note - Prospect meeting tomorrow.

Meeting

Summary

Tags

Entered By

Entered On

Assigned To

Priority

Type

Date Due

Category

Time Spent

Subject

Alert

Complete or No further action required

Repeat Action

Exclude from History

Add Action

Add: Note Letter Service Meeting Goal Associate Insurance Account Tag Follow

Note - Approach Meeting with ?, Referred by ?.

HOW CAN WE HELP?

FAMILY

Note - Create Worldox profile for prospect. Add Worldox code to Junxure under Personal Info > Worldox Client Code.

Note - Please give Michelle the following information as soon as possible so she can track the prospect.

1. Type of opportunity (financial planning AND management or either/or)

2. Projected asset value

3. Actual asset value (total net worth, including anything we wouldn't manage)

4. Projected close date

Thank you!

Letter - Draft content of thank-you letter using the Approach Meeting Thank-you letter template and email directly to the prospect, or assign an action to the CSR to mail to the prospect. You can find the template in Worldox.

Description: Approach Meeting Thank You Letter Template (SFWM DRAFT)

Cabinet: Company

Category: Client

Doc Type: Templates

Sub Type: Misc

Meeting - Complete Ideal Client Scorecard, save it to WD and reassign action to Susan to review it.

Ideal Client Scorecard is saved in Worldox under Company Cabinet > Client > Templates > Misc and named "Ideal Client Scorecard".

Letter - If this is a referral send thank you.

Note - Assign CSR and an Advisor to the prospect.

Service - Enter contact and profile information (Classifications: Prospect and Email; and Keywords: In-Planning, Newsletter).

Service Call

Service - Mail/email directions to the office with Approach folder (or give Approach folder to the advisor to give to client at Approach Meeting). Approach Folder: business cards, story book, values-based investing fold-out, values (to be printed on thick, glossy bond paper), directions to our office, document check list, Financial Planning and Consulting Agreement, Investment Advisory Agreement, Form ADV Part II, published articles (one of our accomplishments, one by Frank Jones).