

Clients | Add | Import

As you add new clients, your total number of clients wil appear here. You can add a new client or import a list of existing clients with only a few clicks.

New Clients

Review Now

Prospects

Send Survey

Notifications

Recent Client Activity View all Sept 23 Devin Cooper added a family member: Mike Jones Sept 04 Sarah Rogers completed a survey: Financial Planning Life Cycle Sept 03 Mark Jacobs added a family member: Jessica Jacobs Aug 28 Devin Cooper edited a survey: Financial Planning Life Cycle Aug 23 Mark Jacobs added a family member: Jonathan Jacobs

Sent Surveys | Send Survey

Need Reviewed

Review Now

Unstarted

View All

In-Progress

View All

162

Completed

View All

What Next?



Engage Potential Clients

Send a survey to propsective clients or something else.

Send Survey



Save Time

Learn how to save time while reaching more clients.

Learn more



Know Your Clients

Review Now



Be Smart, Look Smart

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Learn more



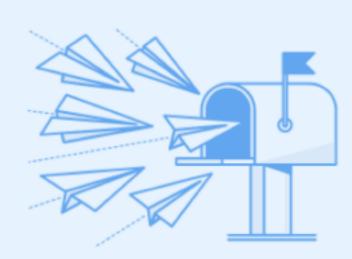




1. Add clients

Add a client, import many, or engage prospects.

Add Client >



2. Send surveys

E-mail custom or pre-built surveys to one or more clients.

Browse Surveys > Quick Send >



3. Review responses

Review survey responses to gain a deeper understanding of a client's goals and ideas.

View Responses >



4. Get the big picture

Review client profiles to prep for meetings in mere minutes.

View Clients >

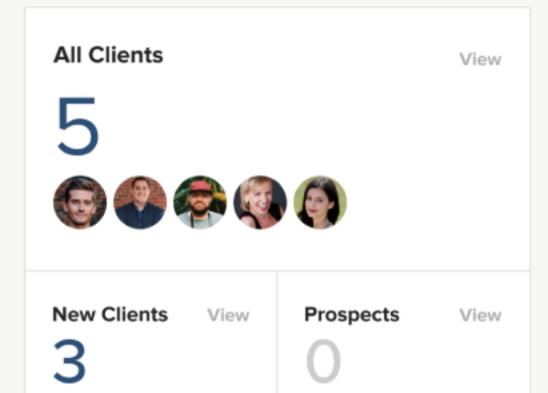
Upcoming



Dec 7, 2018 – in 7 Days

2019 Medicare Health Insurance Open Enrollment Ends. Applies only to people over age 65.

Clients



Activity

Unread (14) Read



Yesterday at 10:52am

Patricia Hasalonglastname completed the Estate Planning survey.

Take a minute to review and write a summary. Review survey.



Yesterday at 10:52am

Patricia Hasalonglastname completed the Estate Planning survey. Take a minute to review and write a summary. Review survey.



Responses

Add Client

In-Progress Need Review View



Yesterday at 10:52am

Patricia Hasalonglastname completed the Estate Planning survey.

Take a minute to review and write a summary Poview survey