

1. Add clients

Add a client, import many, or engage prospects.

Add Client >



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.

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.



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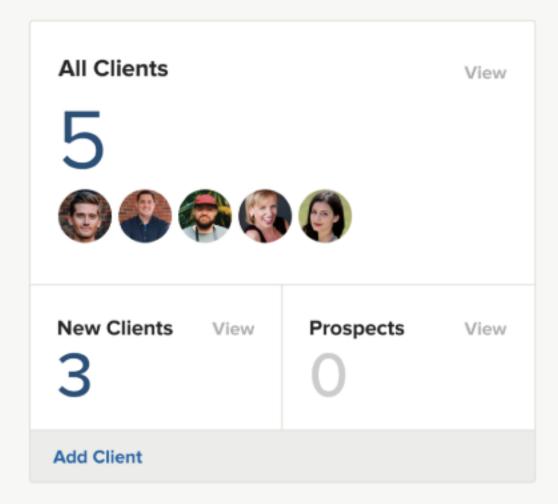
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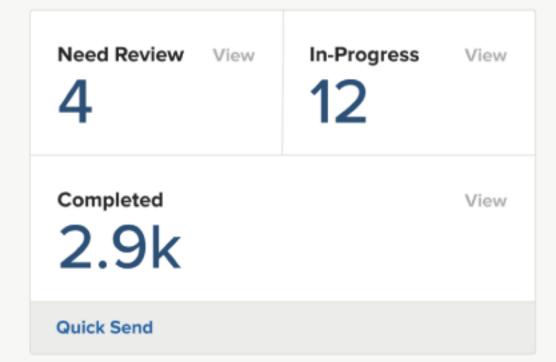
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Clients



Responses



Notifications.