

Clients | Add | Import

74
Total Clients
[Import](#)

2
New Clients
[Review Now](#)

6
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](#)


12
Need Reviewed
[Review Now](#)


17
Unstarted
[View All](#)


44
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 the latest surveys your clients have taken.
[Review Now](#)


Be Smart, Look Smart
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[Learn more](#)

Clients | Add | Import



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

Hide these tips

2

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Review Now

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