



Clients

8

Add New

Import

In-Progress Surveys

12

Nudge

Unread Surveys

3

Review

Completed Surveys

128

View All

Clients

[Add New](#)
[Import](#)

Client	Surveys	Family	Last Updated	
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>
Travis Allen Portland, OR	4 In-Progress 12 Completed		3/20/2017	<div>Actions</div>

Clients | Add | Import

74

Total Clients

Import

2

New Clients

Review Now

6

Prospects

Send Survey

Notifications

Recent Client ActivityView 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