


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

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



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.

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.](#)

Mark as Read 



Yesterday at 10:52am
Patricia Hasalonglastname completed the **Estate Planning** survey.
Take a minute to review and write a summary. [Review survey.](#)

Clients

All Clients View

5



New Clients View Prospects View

3

0

[Add Client](#)

Responses

Need Review View In-Progress View

4

12