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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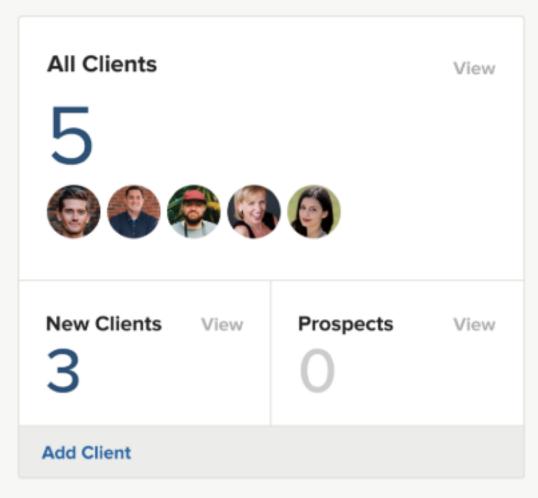


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Take a minute to review and write a summary Review survey

Clients



Responses

Mark as Read

Need Review View	In-Progress	View
2.9k		View
Quick Send		

Company



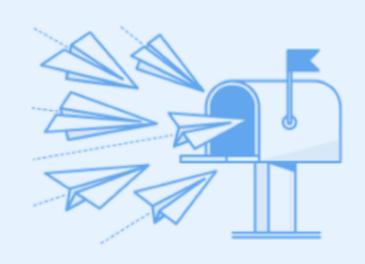




1. Add clients

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 >

Company



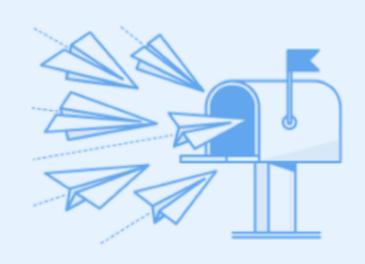




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