

The MFIS CUSO Client Experience

Important Note: Financial Planners conduct Review Meetings with C & D clients by phone or in written format because they simply do not have the capacity to do them face to face and it is not a good use of their time.

MFIS are expected to conduct these Review Meetings in person whenever possible.

	Review Meeting	Service Call	Relationship Call (Use FORM)	Thanks giving Card	MOT	Events	Emails & Articles
CA Clients Top 20-25	Annual PFO Mini	Annual	Semi-Annual	Annual	Annual	Semi-Annual	Quarterly
C Clients	Annual PFO Mini	Annual	Annual			Semi-Annual	Quarterly
D Clients	Annual	Annual				Annual	Quarterly