REALITY CHECK 8

NEW CLIENT PROCESS

Name: Click and type

Date: Click and type

Once you’ve completed this best practice, submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check*.
    - Email it as an attachment to your designated support representatives.

1. What is the overall objective of the New Client Process? Click and type
2. What are the 4 major phases in this process? Click and type
3. How will this process benefit your new clients? Click and type
4. How will this process benefit you as a Financial Professional? Click and type
5. How will this process benefit the organization? Click and type