🗹 REALITY CHECK

Name: Click and type

Date: Click and type

Once you’ve completed this strategy, please submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check* and email it as an attachment.

Client Segmentation

1. What 3 attributes are used to assess the value a client brings to you and your organization? Click and type
2. How does segmentation benefit the client? Click and type
3. How does segmentation benefit you – the Financial Advisor? Click and type
4. How does segmentation benefit the organization? Click and type