Maximizer Action Plans

Here is a list of possible Action Plans you can use that have already been created for you on Maximizer as automated core workflows:

Client Experience

- Client Experience AAA
- Client Experience AA
- Client Experience A
- Client Experience AF
- Client Experience B
- Client Experience C
- Client Experience D

Client Onboarding

- New Client Part 1 - FIT
- New Client Part 2 - Standard
- New Client Part 3 - VIP

There are also many Action Plans for routine activities which come pre-built with Maximizer.

Client Administration

- Address Change – Digital Form
- Address Change – Email
- Address Change – Regular Mail
- Client Account Opening – By Phone
- Client Account Opening – In Office
- Client Account Opening – Out of Office
- Death of a Client
- Deposit – Cheque Received
- Deposit – Online Deposit/Wire
- Estate Planning – Fact Finding
- Insurance – Annuity
- Insurance – Life Insurance New Application
- Insurance – Individual Disability New Application
- Insurance – Long Term Care New Application
- Insurance – Group Insurance New Contact
- Insurance – Group Insurance Quote
- Mortgage – New
- Mortgage – Refinancing
- Mortgage – Pre-Approval
- Recurring – AWD Change
- Recurring – AWD Set Up
- Recurring – EFT Change
- Recurring – EFT Set Up
- Recurring – PAC Change
- Recurring – PAC Set Up
- RRSP Deadline Action Plan
- RRIF Conversion Sequence
- Segregated Funds – New Contract
- Tax Planning Reminder
- Transfer In Internal – Securities
- Transfer In Internal - Cash
- Transfer In External – In Kind
- Transfer In External – In Cash
- Transfer Out – In Kind
- Transfer Out – In Cash
- Update KYC – By Phone
- Update KYC – In Office