**Phone Review Meeting Checklist**

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| **Step** | **Review Meeting Activity** | **Completed on:** |
| 1 | Review the list of clients prompted for **Telephone Review Meetings**  | Day 1 |
| 2 | Schedule the **Telephone Review Meeting** with the Client  | Day 2 |
| 3 | Add **Telephone Review Meeting** to your Calendar | Day 2 |
| 4 | Send **Telephone Review Meeting** Confirmation Email to client.  | Day 2 |
| 5 | **Telephone Review Meeting** Preparation:* Telephone Review Meeting Agenda
* Account Administration – Forms requiring updating
* Investment Management - Portfolio Summaries
* FORM Information Summary & OTHER
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| 6 | Confirm **Telephone Review Meeting** via phone with Client  | Day before Review |
| 7 | Send **Telephone Review Meeting** items for discussion to the client via email (Agenda, summaries, all visuals for discussion) | Day before Review |
| 8 | **TELEPHONE REVIEW MEETING** with AgendaCall on time and use their preferred telephone number | Day of Review |
| 9 | Maximizer: Click “Telephone Review Meeting” as complete  | Same/Next Day  |
| 10 | Maximizer: Add related notes and/or upload related files  | Same/Next Day |
| 11 | Debrief **Telephone Review Meeting** & Set Follow Up Items  | Same/Next Day  |
| 12 | Maximizer: Trigger all follow up activities accordingly | Same/Next Day |
| 13 | Maximizer: Check next **Telephone Review Meeting** prompt setEnsure Meeting Preference is noted: In-Person, Virtual, Phone. | Same/Next Day |
| 14 | Account Administration Follow Up If paperwork was updated on the call, send via email for cyber signature and/or mail out hardcopy and set follow up. | Within 1 week |
| 15 | Investment Management Follow Up | Within 1 week |
| 16 | Financial Planning & Lending Follow Up  | Within 1 week |
| 17 | Ensure all client promises are delivered on  | Varies |