REALITY CHECK 5

CLIENT ANALYSIS

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 does the 80/20 principle refer to in the context of analyzing your clients? Click and type
2. If you could replicate your top 25 clients, what impact would it have on your AUM? Click and type
3. What was the most useful information you learned from conducting your Client Analysis? Click and type
4. When meeting with higher value clients with more sophisticated investment and planning needs, do you understand the process to introduce them to the **Financial Planner**? Click and type
5. When meeting with base-line clients who are best suited for automated investment solutions, do you understand the process to introduce them to this entry-level investment approach (**Virtual Wealth**)? Click and type
6. Have you scheduled an annual review on Maximizer to update your Client Analysis Worksheet? Click and type