Certified Personal Financial Wellness Consultant

Client Email Communications

Table of Contents

National Financial Educators Council

Client Onboarding Series

Client Onboarding Series

- Welcome Email
- Receipt Email
- Scheduling the First Meeting
- Preparing for the First Meeting

Understanding Phase

Understanding Phase

- Initial Interview Request Emails
- Client Information Requests
  - Complete Financial Psychology Assessments
  - Income, Savings & Assets Information Requests
  - Expenses, Loans & Debt Information Requests
  - Money Management (Credit, Accounts) Requests
  - Insurance & Investment Requests
- Client General Information Requests
- Missing Information Reminders
- Receipt Acknowledgement Notifications

Goal Setting & Prioritization

- **Goal Setting & Prioritization**
  - Goal Setting
    - Goal Assignment
    - Assignment Check-in
    - Goal Feedback
  - Prioritization
    - Prioritization Assignment
    - Assignment Check-in
    - Prioritization Feedback

Education & Guidance Phase

- **Education & Guidance Phase**
    - Assignments
        - Assign Activities & Education
        - Assignment Check-in
        - Assignment Feedback
    - Accountability
        - Scheduled Check-in
        - Encouragement Email
        - Late of Deliverables Email
        - Feedback & Congratulatory Email

Meetings & Appointments

Meetings & Appointments

- Schedule Coaching Sessions
- Appointment Reminders
- Follow-up Communication
- Missed Appointments

Client Stage Change Series

- **Client Stage Change Series**
  - Client Transition to a Different Track
  - Progression to Next Level

Ongoing Education

- **Ongoing Education**
  - Timely Education Emails
  - Topic Based Education Emails (Over 100)
  - Training Invitations

Client Customer Service

Client Customer Service

- Payment Approved Receipt
- Payment Decline
- Rebilling Notification