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Client Onboarding Series

- Welcome Email
- Receipt Email
- Scheduling the First Meeting
- Preparing for the First Meeting
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
  - Goal Assignment
  - Assignment Check-in
  - Goal Feedback
- Prioritization
  - Prioritization Assignment
  - Assignment Check-in
  - Prioritization Feedback
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

- Schedule Coaching Sessions
- Appointment Reminders
- Follow-up Communication
- Missed Appointments
Client Stage Change Series

- Client Transition to a Different Track
- Progression to Next Level
Ongoing Education

- Timely Education Emails
- Topic Based Education Emails (Over 100)
- Training Invitations
Client Customer Service

- Payment Approved Receipt
- Payment Decline
- Rebilling Notification