**Client Onboarding Request:**

**Advisor on the call:**

* Schedule the clients for info gathering phone call, if info not already gathered
* Friend request on linkedin
* Add the clients to the appropriate advisor tab in segmentation sheet and add all relevant information
* Save YP notes to dropbox – or send all files to Nifty to box

\*include COO on all of these emails please!

**Marie:** Please do the following to onboard the client:

* Add the clients’ email addresses to “address book” and “mass emails” tabs in Segmentation (if TRUL client, add in separate section of each tab)
* Add name/DOB of clients to “Birthday Sheet” (if TRUL, put in note NOT to send gift yet)
* Send welcome box (book, team brochure, pen, letter) and update in WOW notes in important info
* Add their emails to add them to email list on mailchimp and Dubb, add appropriate tag (to advisor or TRUL)

*Client names* agreed to join EWA. They’re segmentation is A+ , A, EA

Please do the following to onboard the client:

* Make a dropbox file for the client with subfolders if there isn’t already a folder
* Share clients’ phone numbers with the team (share contact in cell phone)
* facebook friend request AND friend request on Instagram the clients (if don’t have advisor’s login have them do it)
* put all client information (attached) into Redtail (should be DOB, SSN, contact info, etc.) – be sure to check that the servicing advisor is listed as requester
* Copy/paste the important info template into Redtail (see below)

**TEMPLATE FOR IMPORTANT INFO:**

**Annual Process info:**

1. Current recurring revenue
2. Potential revenue
3. Last meeting date
4. Current state of the union
5. future potential

**Cliff Note:   
  
Communication method / amount:   
  
Annual contribution:**  
**Values:  
  
WOW notes:   
  
Geography:   
  
General Notes:   
  
Joint Work Partner:   
  
Anniversary:   
  
Kids' names / DOB  
  
Upcoming key life/special events   
  
File format:   
  
Attorney:   
  
CPA:   
  
Other advisors:   
  
Client Survey:**beverage/snack:   
wine/liquor/beer:   
book/magazine:   
sports team:   
College attended:   
active alumni:   
charity / org:   
family activities:   
hobbies:   
travel / vacation:   
movie:   
music:   
special interest:   
other notes: