

High-Touch Client Onboard Experience

Step-by-Step Guide

01

Advisor Next Steps Email

Bombbomb video welcoming the client with explanation and link to www.candorpathclients.com

02

Weekly Progress Tracker

Team member initiates the paperwork process and begins updating our weekly progress tracker



03

Team Introduction Email

Introduction email from client concierge team member explaining paperwork and progress report

04

Weekly Progress Report

Client concierge begins weekly email report each Friday by 9am to update the client accordingly



05

Client Welcome Box

Once paperwork is signed, the client welcome box is curated and mailed to the client

06

Final Weekly Progress Report

Once all actions are completed by us and by the client, the final report is sent along with ICS request

07

Interactive Client Survey (ICS)

Client concierge team member conducts a live survey for feedback and referral purposes