Check-ins

Email Check-ins build a strong foundation to support your message between client reviews and give you an early warning signal when client psychology needs care.

Select Elite Enterprise

A built-in early warning system.

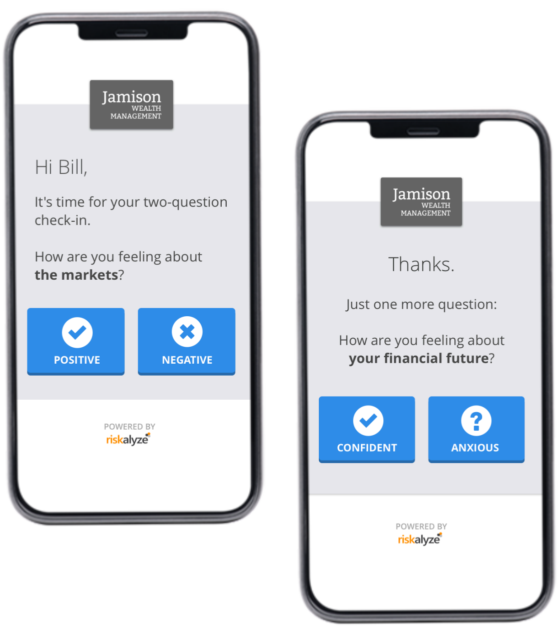
Check-ins is an automated behavioral coaching tool that allows you, the advisor, to take the pulse of your clients on a regular basis. That way, you're set to receive an early warning sign if a client's psychology needs a little care.

Now, you get data points on how your clients are feeling about the markets and their financial future, allowing you to take action at the first sign of trouble.

Client Check-in History

CHECK-INS

	JAN	FEB	MAR	APR	MAY	JUN	JUL
The markets?	✓	✓	✓	✓	✓	✓	✓
Financial future?	✓	✓	✓	✓	✓	✓	✗



Behavioral coaching made easy.

With two taps on their smartphone, clients see adaptive analytics that help them understand what is "normal" for their portfolio, giving you an ally in the never-ending fight to keep client psychology positive.

We've engineered this to be simple with just two questions:
• How are you feeling about the markets?
• How are you feeling about your financial future?

Once they've responded, you can include a dynamic message to build a strong foundation between client reviews.

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