

Are You Engaging with Intent?

More than one-third of investors believe they are being underserved with respect to their financial advice relationships¹.

This may leave you considering two things:

- 1 How satisfied are your current clients in their relationship with you?
- 2 What can you do to attract and secure a relationship with a portion of this underserved population?

Whether or not you are pondering one or both of the questions above, the solution lies in actively focusing on client interactions to ensure that your current and future clients are secure and satisfied with the experience you deliver.

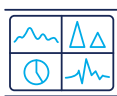
So how can you do this at scale, with a manageable tech stack, in alignment with the individual expectations of your clients? Focus on engaging with intent and start by asking yourself the questions below.



Are your **marketing** tactics targeted to your ideal customer?



Is your new client **onboarding** process convenient, easy, and effective?



Do you provide your clients with a clear view of their **full financial pictures**?



Are you delivering a **consistent experience** to your clients?



Is your **financial planning process** transparent and understandable?



Are your **communications** in alignment with your clients' preferences?



Do you have a **compliance** solution in place?



Can you confidently tell your clients that their personal information is **secure**?



Are you being thoughtful of how and when your clients want you to **engage with them**?



Ready for some answers?

Learn how to engage with intent at www.emoneyadvisor.com