



Client Meeting Prep

Client Case Coordination

Enhance

Enhance the client experience with proactive meeting prep

Walk into every client meeting prepared with a clear snapshot of the client's situation and key opportunities identified. This results in an enhanced client experience and client loyalty.

Grow

Grow the practice with scalable systems and new client opportunities

Save you and your team time and money by leveraging reliable systems to help you deliver consistent quality opportunities to clients while scaling your practice quickly and efficiently.

Save

Save time, focus on important tasks, and increase profitability of the practice

Outsourcing your client prep allows you to focus your internal resources toward other high value tasks while tapping into the experience and skills of a full service client prep team.

Why Advisors Choose Us

Here are just a few reasons why advisors choose to outsource their meeting prep to Key Management Group:

- To redirect team members toward other critical client services
- To provide quality assurance to avoid missed information or opportunities during client meetings
- To streamline and simplify the client prep process
- To reduce the amount of time advisors spend preparing for client meetings
- To collaborate on opportunities and recommendations

Key Advantages

Flat Fee Options

Scalable Service

Customizable

Quality Results



Client Meeting Prep

Three Ways To Serve You



Essential Meeting Prep	Full Meeting Prep	Client Meeting Coordinator
Everything you need to comfortably walk through the client's situation and discuss key opportunities and recommendations.	Everything in Essential PLUS additional detailed reports and analytics to make advanced recommendations.	Receive a dedicated Meeting Coordinator to help manage your client prep meetings and review recommendations.
\$20 per case	\$35 per case	\$1000 per month

*KMG Client Meeting Preparation clients pay a standard rate of \$25 for eMeeting Services through Ameriprise. A detailed list of services and outline of the client meeting prep process is available upon request.

What Advisors Are Saying

The difference KMG made was stark. Everything is scheduled, there's a process, and there's a customizable client experience. Thanks to KMG we are now much better financial planners today than before. The value that the client receives is high level. Because of that and because we are providing great value and quality, we are not shy about what we charge clients.

- John Everson, The Myrias Group



Take The Next Step Toward

Better Client Meeting Prep

If you are ready to see how Key Management Group can help you elevate your client meeting prep to see more efficiency and greater profits, contact Nick Tucker at 248-218-1250 or at ntucker@keymanagementgrp.com.