Client Meeting Prep and Coordination

HOW IT WORKS

WHERE WE START:

- ✓ **Agreements & Access:** Establish FC Agreement and OBO Access via AMPF Forms.
- ✓ **eMeetings Set Up:** Establish eMeeting access and establish KMG's discount. We will ensure you are signed up for eMeetings training if you are not we will connect you with a eMeetings specialist at home office to establish training
- ✓ **eMeeting and Advisor Agenda Preferences:** Create themed meeting agendas and eMeeting preferences according to advisor preferences.
- ✓ **Investment Philosophy & Client Opportunities Preferences:** Understand investment & opportunity preferences to meet advisors needs.
- ✓ **Submission Process:** Review client meeting prep request submission process with from advisor to KMG, timeline and actions.

WEEKLY CLIENT MEETING PREP PROCESS

ADVISOR RESPONSIBILITY

1

Request Submission

- Case Prep Request form through CRM.
- Advisor Team completes CPR with appointments for preparation for a specific calendar week. 1 or 2 weeks prior to your client meetings based upon advisor preference.

KMG RESPONSIBILITY

2

Data Collection and Essential Prep Creation

- Utilizing Ameriprise tools, we collect all appropriate client data points and create the advisor agenda and eMeetings presentation.

3

Full Prep Report Creation

- Creation of advisor requested reports, PMT, Morningstar, etc.
- Preparation of the advisor agenda based on meeting specific agenda topics.

4

Upload Prep

- TO WORKSPACE IN CRM. Reports can be uploaded to the client's folder in Box through CRM.

ESSENTIAL & FULL PREP ONLY

5

Access Documents in FINAL CASE PREP BOX

Review Documents and finalize meeting agenda

CLIENT MEETING COORDINATOR

6

Case Collaboration Meeting (Advisor)

- Standing weekly online meeting with Advisor and KMG meeting coordinator.
- Review of each client's meeting preparation for opportunities and finalization.

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7

Final Prep Finalization & Upload to FINAL CASE PREP BOX

- Creation of the Client facing agenda and Advisor facing agenda to PDF.
- Upload client meeting follow up, creating insurance reprojection and additional reports to AMPF BOX.

8

Access Client Meeting Preparation in advance of client meeting

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Unlocking Your Potential

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