

# CURRENT SALES PROCESS



Meet Client:  
Gather Information



Create:  
Financial Plan



Schedule:  
Follow Up Meeting



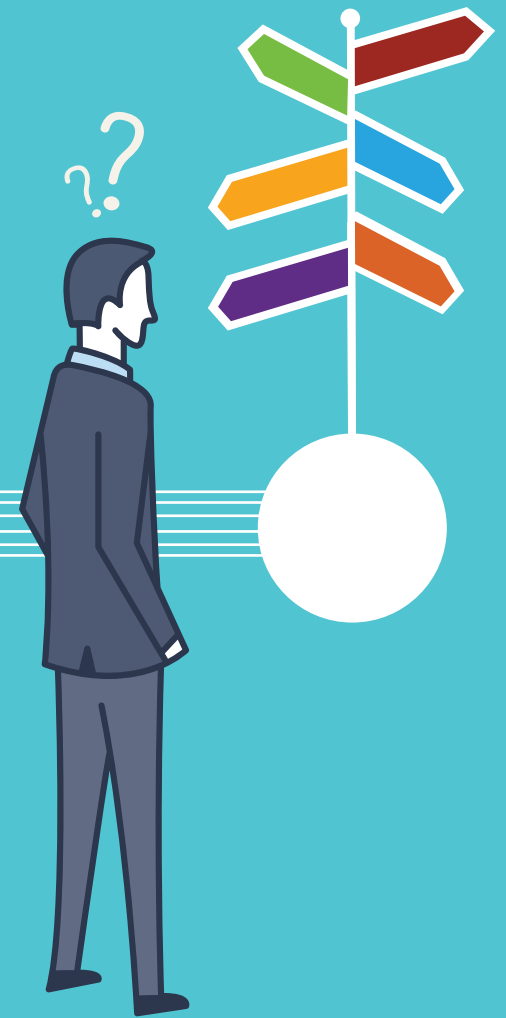
Present:  
Financial Plan



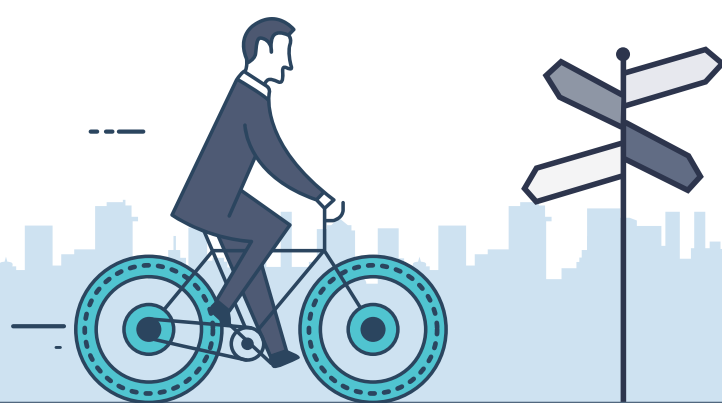
Organize:  
Signed Documents



Implement:  
Financial Plan



# NEW SALES CYCLE WITH MY SERVICE



Client visits website, fills out information themselves (eliminating meeting 1, goals are now defined)



API integration with Money Guide Pro brings in data from salesforce API to aggregate all input data into financial plan



First meeting happens, which covers goals of original meeting #2. 2 steps have already been eliminated (step 1 and step 2)



During this meeting, a plan has already been created in new step 2, which is now presented. Paperwork is signed/account opened.

# BENEFITS

## EFFICIENT SALES PROCESS



Increased compliance (electronic records of client data created at every step, initiated by client)

Reduced sales cycle time



Reduced advisor workload (api integration automates: collecting data, creating plan, preparing for meeting, and document signature collection)

More "hooks" you can elaborate on with research.



Increased client account service, greater scalability. Advisor can now handle 3x more households due to increased efficiencies.