Workflow Diagram.

	PREPARE	CONDUCT	FOLLOW-UP
Advisor	Evaluate and approve ↑ YES		
Associate Advisor	START → Meet with advisor to debrief and confirm tax planning idea → Create communication, report and/or deliverable as needed Make sure to utilize SEI Dashboards and/ or reports if needed → Approval required? → NO →	Identify client personas who can benefit. Bulk launch needed workflows or activities for those clients. Need help? check out our take tax action - client identifiers guide →	Update CRM & other systems if needed → END
CSA			

©2022 SEI