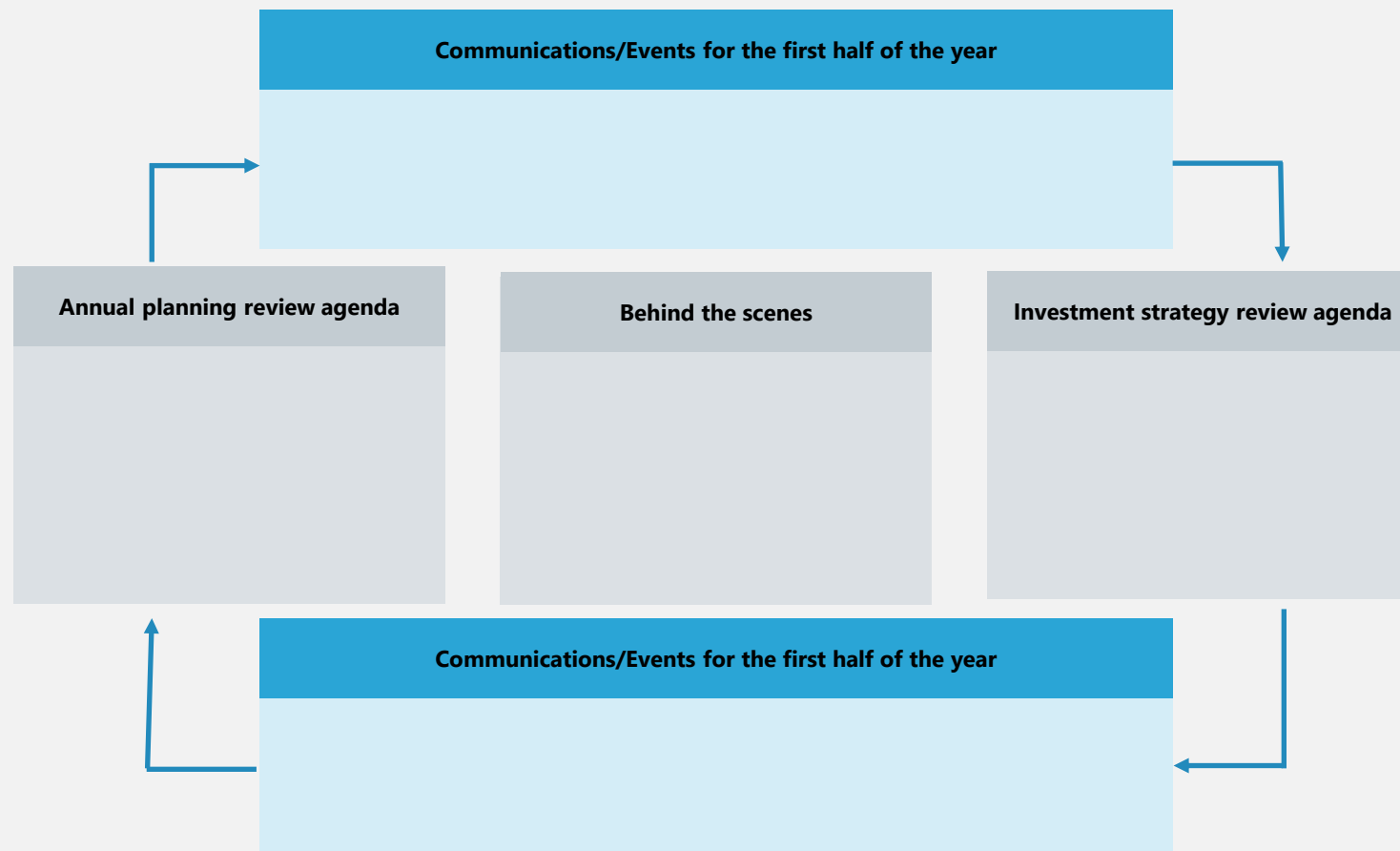
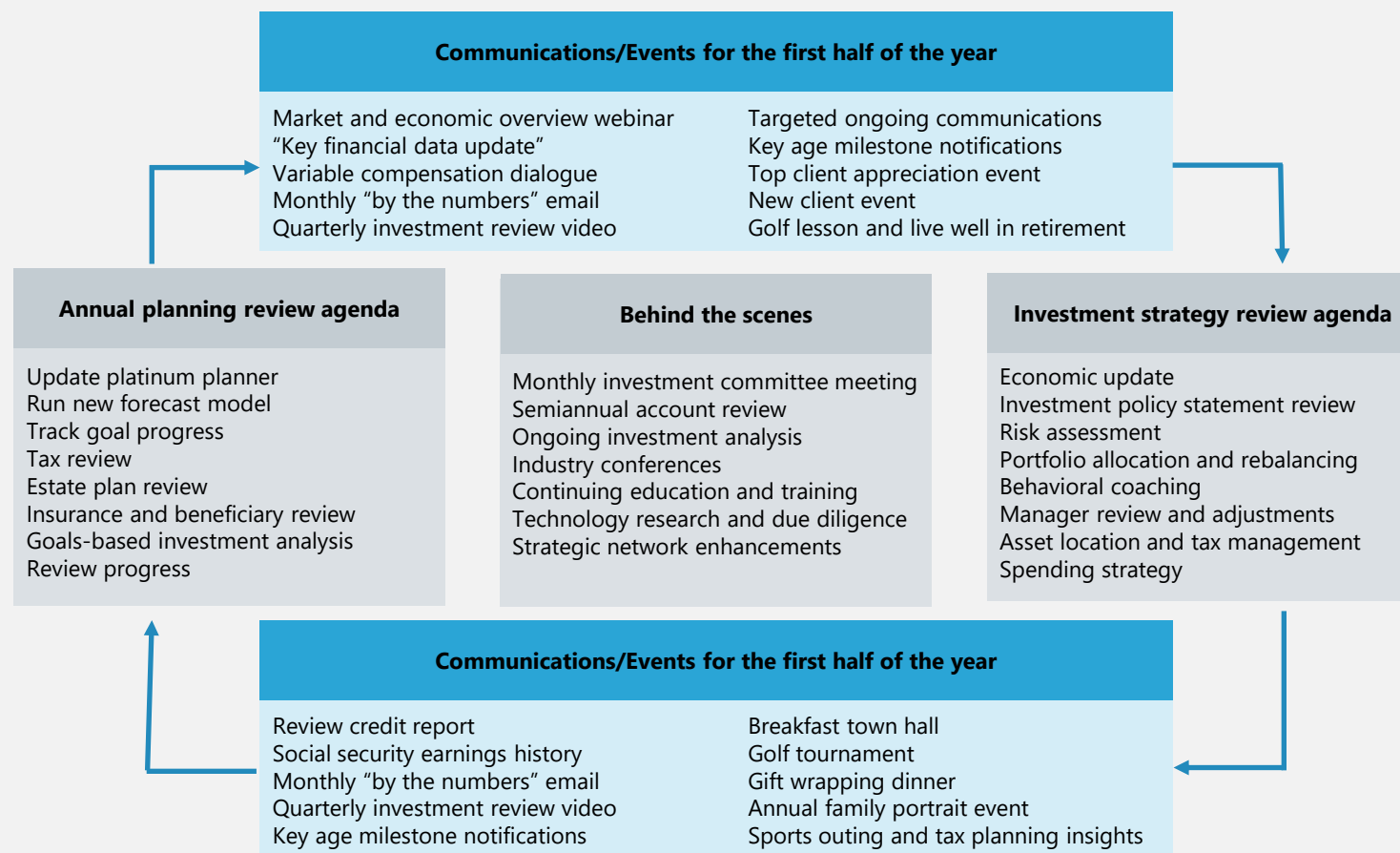


Client experience visual template.

Use this template to create your client experience visual



Client experience visual example.



Client service overview template

Use this template to create your client services visual

Services & Pricing

Your firm value messaging

	Package 1	Package 2	Package 3
Services provided			
Best for			
Cost			



Client service overview example

Use this example to create your client services visual

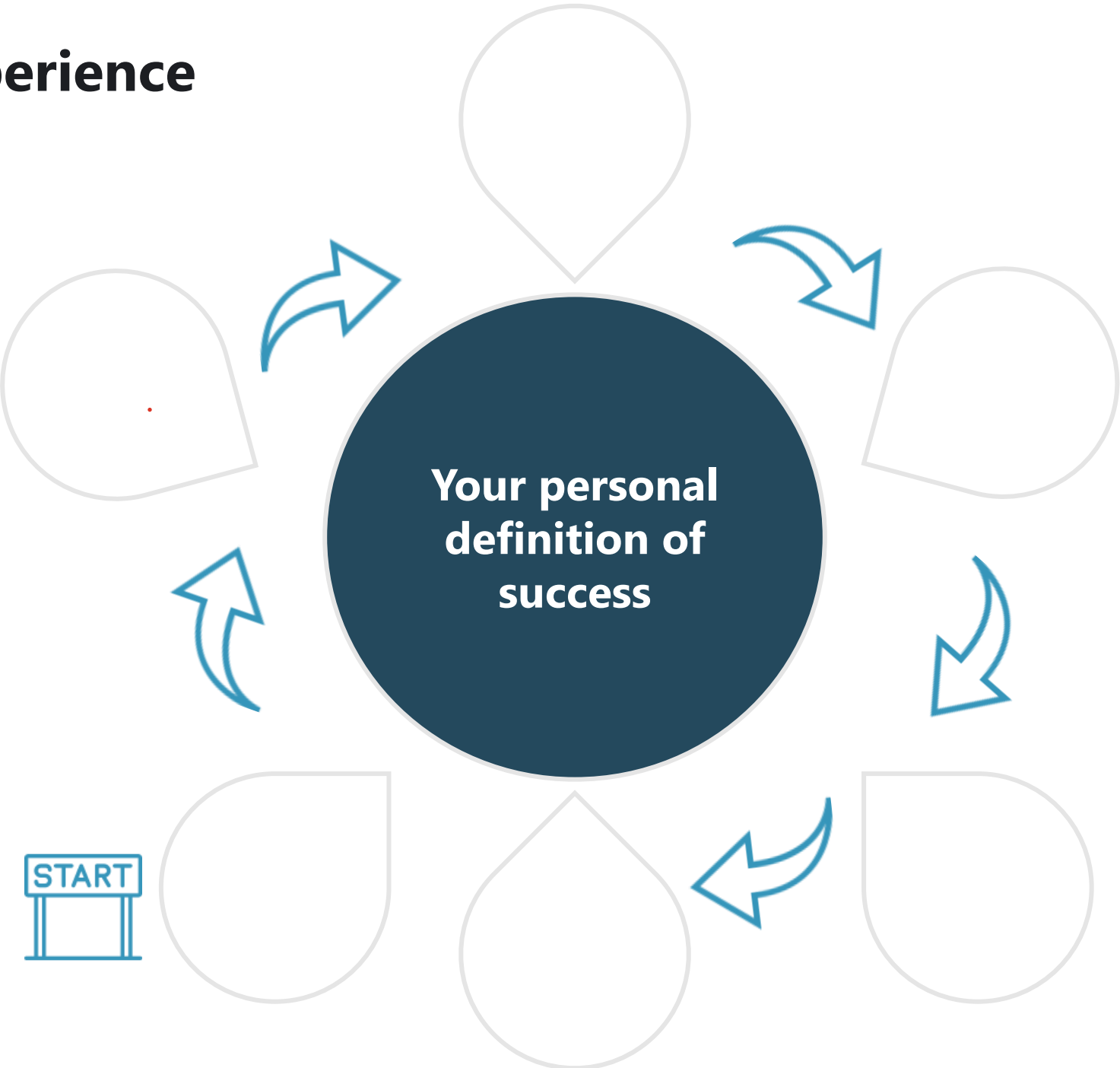
Services & Pricing

Your firm value messaging

	Package 1	Package 2	Package 3
Services provided	• Investment management • Financial planning	• Investment management • Financial planning • Implementation	• Investment management • Financial planning • Implementation • Concierge services
Best for	• Individuals and families seeking professional financial advice and management • Will act on recommendations	• Families seeking professional financial advice and management • Will NOT act on recommendations • Seeking proactive accountability • Desire hands-on implementation support on a reoccurring basis	• Individuals, families, and business owners with wealth that impacts generations • Needs hands-on implementation support • Project work that impacts financial life and/or business • Seeking a proactive financial accountability partner for family
Cost	\$100/month +1% of assets managed	\$300-500/month +1% of assets managed	\$1,200/month +1% of assets managed



Process Experience template



Process Experience example

