

# New Client Advocate Checklist

Step	Activity	Person Responsible	Completed On
1	Send Thank-you card to client*		
2	Initial Call to Potential Client	Advisor	
3	Send Introduction Kit		
4	Call to set up First Appointment		
5	Send First Appointment Confirmation Letter		
6	Make First Appointment call		
7	First Appointment with Agenda	Advisor	
8	Make "Is There A Fit" call	Advisor	
9	Send Second Appointment Confirmation Letter and Checklist		
10	Make Second Appointment confirmation call		
11	Second Appointment with Agenda	Advisor	
12	Make Third Appointment confirmation call		
13	Third Appointment with Agenda	Advisor	
14	Send New Client Welcome Card		
15	Send New Client Welcome Letter		
16	Send New Client Welcome Gift		
17	Make First Statement and Care Call		

New Client Advocate Process Completed: (Date)

\*This is the only step in the process directed at your existing clients. All other steps are implemented with the potential new client.

