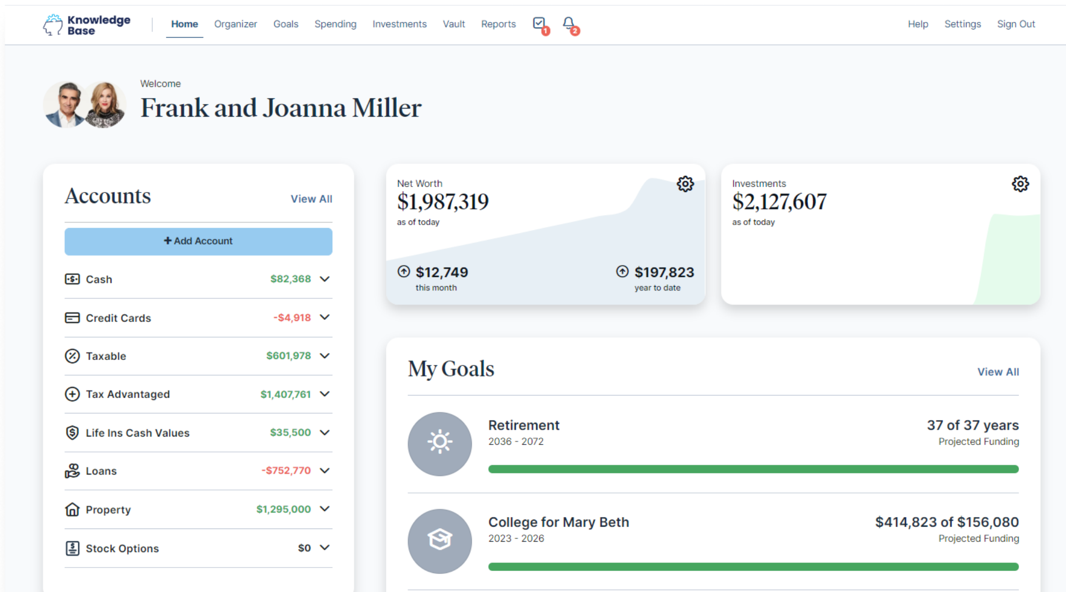
Guide to the Client Experience

Personal Financial Website

This User Guide details the recommended steps to take before, during, and after you've given your Client access to their Client Website – including tips, best practices, and testimonials to set you and you Clients up for success.

The Rollout

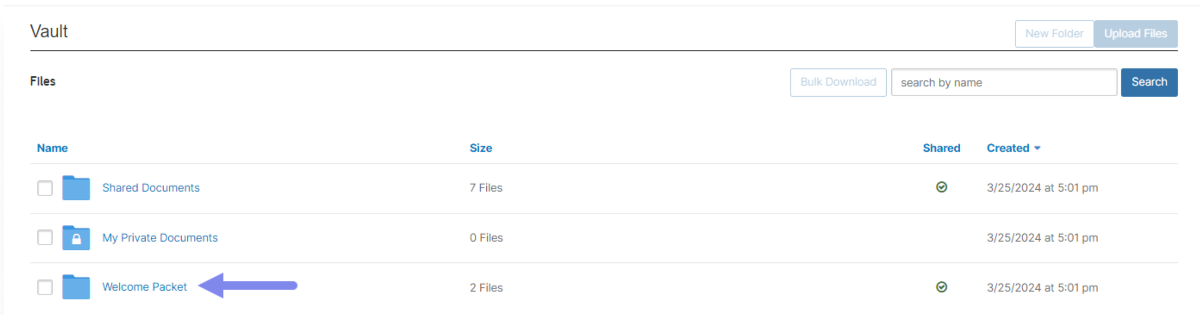
Before you decide to roll out the Client Website, create a Client Website for yourself so you can understand its features. This will help anticipate and answer any questions your Clients may have, as well as discuss the value of the Client Website.



Best Practices for a Successful Rollout

- Proactively discuss Security before your Client voices any concerns
- Introduce the Client Website during an in-person meeting
- Set an expectation that all important communication will take place through the Vault (i.e. Reports, fact-checking documents, etc.)
- Explain that the website is bi-directional and using it is a part of your process. Help them understand that what they enter will flow through to the plans you build for them
- Turn on the **Onboarding** wizard for their first login
- Turn on the **Client Login Inactivity Alert**. This alert will trigger if your Client hasn't logged into their website in a certain number of days. Once it is triggered, you can upload a document to their Vault to help re-engage them
- Turn on the **Onboarding Alert**. This alert will trigger when your Client has completed Onboarding so you can stay on top of their progress

- Create a **Welcome Packet** folder in the Vault and upload necessary Client-facing user guides. For more information, see **Tips and Resources**, beginning on page 3.



Before Your Client Logs In

Connect Managed Accounts

It is important to connect any managed accounts before the meeting, so your Client sees their information populated when they log in for the first time. If you have additional information about your Clients, add it before their first log in so they can verify and update the information in real-time.

- **If you are rolling it out *during an in-person meeting:***
  Before the meeting, ask your Client to collect their usernames and passwords for any online accounts as well as any important documents you require in your process

- **If you are rolling it out *through Onboarding first and then meeting:***
  Before sending your Client through Onboarding, email them to set expectations and explain what you would like them to accomplish with their website before the meeting. Bamboo subscribers can send a welcome email within the platform by navigating to Bamboo > Emails > search Client Portal introduction.

During the Follow Up Meeting

Verify Data Entry Process

Go over the Client Website Organizer together and ensure that the Client is clear on how to enter their information. It is important they understand this is bi-directional and flows through to the plans you are building.

Troubleshoot Client Connections

It is important to connect accounts with them, or troubleshoot what they connected on their own together, so they are aware of the process they must go through to connect the rest of their accounts. If the Client decides to connect a checking account or credit card, they can immediately begin using the Spending and Budgeting tools.

Get the Client Website on Their Phone

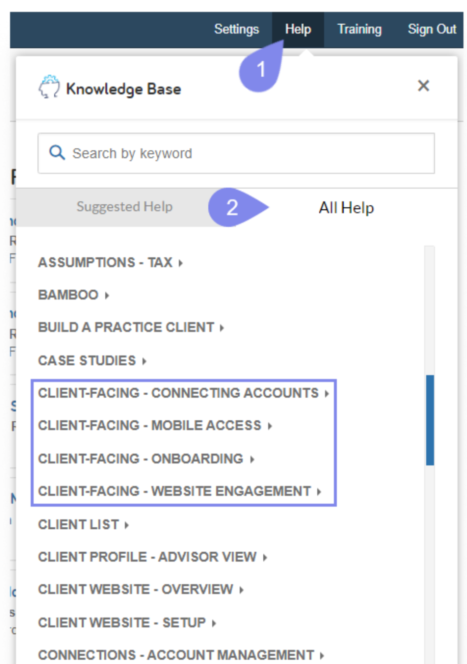
The mobile bookmark can be free marketing for you. Once they have the bookmark saved on their phone, your logo will appear as well.

Enter Their Goals

This is a great time to enter their Goals and funding sources so that the next time they log in, they see their Goals and they begin connecting the dots between the Client Website and the plans you will be building for them.

Upload Documents to the Vault

If your Client brings documents or pictures with them to the meeting, help them upload those to the Vault. A simple way to accomplish this is to have them log into the Client Website on their phone, take a picture of the document and upload it to their Vault.



Tips and Resources

Welcome Packet Vault Folder

Many Advisors find success by creating a virtual Welcome Packet inside the Vault. The Welcome Packet should contain information on security, your contact information, instructions on how to use the website, and more. For helpful Client-facing resources to upload to the Welcome Packet folder, navigate to **Help**, click **All Help**, and scroll down to the **Client-Facing** categories.

Testimonials & Best Practices from Power Users

Use the video links below to help you understand how to position the Client Website, talk about security, and utilize the Vault with your Clients. The mobile bookmark can be free marketing for you. Once they have the bookmark saved on their phone, your logo will appear as well.

- How to Position the Client Website 1
- How to Position the Client Website 2
- Discussing Client Website Security
- Using the Vault to Track Client Progress
- Best Practices When Using the Vault

Example of Email Template to Client

This type of email should be sent before the first meeting to introduce the Client Website. You can attach Client-facing resources to this email as well. To use this template, **copy and paste** the text below into a new email.

Bamboo subscribers can access, distribute, and monitor this email and more, directly from the Bamboo platform by navigating to Bamboo > Emails > search Client Portal Introduction.

Dear Client,

We have implemented an exciting new technology designed to provide you with an interactive wealth management tool and ensure transparency and holistic planning.

The available services include:

- Personal website within 24-hour access to all your financial information
- Account Aggregation with Budgeting
- Goal Monitoring
- Investment Updates
- Encrypted Vault for storing documents
- Mobile web access

We strive to provide the best strategic advice available to ensure our clients make informed investment and lifestyle decisions. This personalized planning tool will assist us in making these decisions with up-to-date and accurate financial information.

I will be sending you a Welcome Invitation to self-register your *[Personal Financial Website].*

If you have any questions or would like to schedule an appointment, please call *[your Firm's number].*