

How to Create Engaging Financial Planning Experiences

Because clients want collaboration, transparency, and 24/7 access to their financial information, advisors are looking for solutions to help satisfy these expectations. Review the suggestions below to provide experiences that attract and retain clients.

Build a Brand That Builds Trust

To build trust, you need to create a brand that conveys honesty, partnership, and something personal about you and your service.

- Communicate the value you provide through your service.
- Share your process—let prospects know what they can expect.
- Offer 24/7 digital experiences and interactions with an intuitive, responsive website.
- Build plans that help clients achieve short-term goals while preparing them for longer-term commitments.
- Apply your brand consistently across your website, emails, and client portal.

Deliver on Client Expectations at Onboarding

Once a client is ready to work with you, ensure their onboarding experience meets the expectations you created with your branding and advertising.

- Create an onboarding process that is organized, sequential, and automated.
- Integrate your technology tools so client data synchronizes automatically between them.
- Use account aggregation to ensure you have an accurate picture of your client's entire financial situation.
- Allow clients to track their progress throughout the process.
- Securely store and share digital documents through one database.

Plan for the Long Term

To build long-lasting relationships, empower your clients so they are invested in their financial plans. Help clients focus on their goals and the progress they're making towards them.

- Encourage collaboration through a client portal to establish goals and create a holistic financial plan.
- Use planning software that tracks clients' progress toward goals rather than just returns.
- Improve decision-making with online financial plans that update automatically and continuously.
- Give clients the ability to visualize in real time the potential impact of decisions on their financial plans.
- Grow your business by targeting prospects with a wider range of financial needs.

Personalize Your Service

To retain your book of business, you need to offer a service that is personalized, customized, simple—and always available.

- Recognize where your clients are in their lives and what planning is reasonable.
- Understand how your service and technology offering addresses client needs.
- Log every client interaction for compliance and future reference.
- Learn about your clients' lifestyles and offer ways to balance saving and spending.
- Provide digital experiences that are personalized, engaging, and easy to use.

Communicate Often

Poor communication consistently ranks as a top reason why clients fire their advisors. When advisors communicate well, clients feel important, prospects are well-informed, expectations are met, and everyone is happier.

- Be transparent about your services and how you're paid.
- Communicate with clients and prospects on the social channels and websites they use.
- Request feedback often, take it seriously, and act on it.
- Develop customized communication plans that clients can opt in or out of.
- Provide resources such as newsletters or blog posts that increase your clients' financial knowledge.



See Results

By employing the right technology at every step of your service offering, you can provide prospects and clients a financial planning experience that is consistent, automated, collaborative, and engaging.

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