Third Thursdays

WOMEN in RETIREMENT

Not just a pretty face: How branding sustains you and your organization's culture and success

AMERICAN RETIREMENT ASSOCIATION

Not just a pretty face: How branding sustains you and your organization's culture and success

1.8 CE

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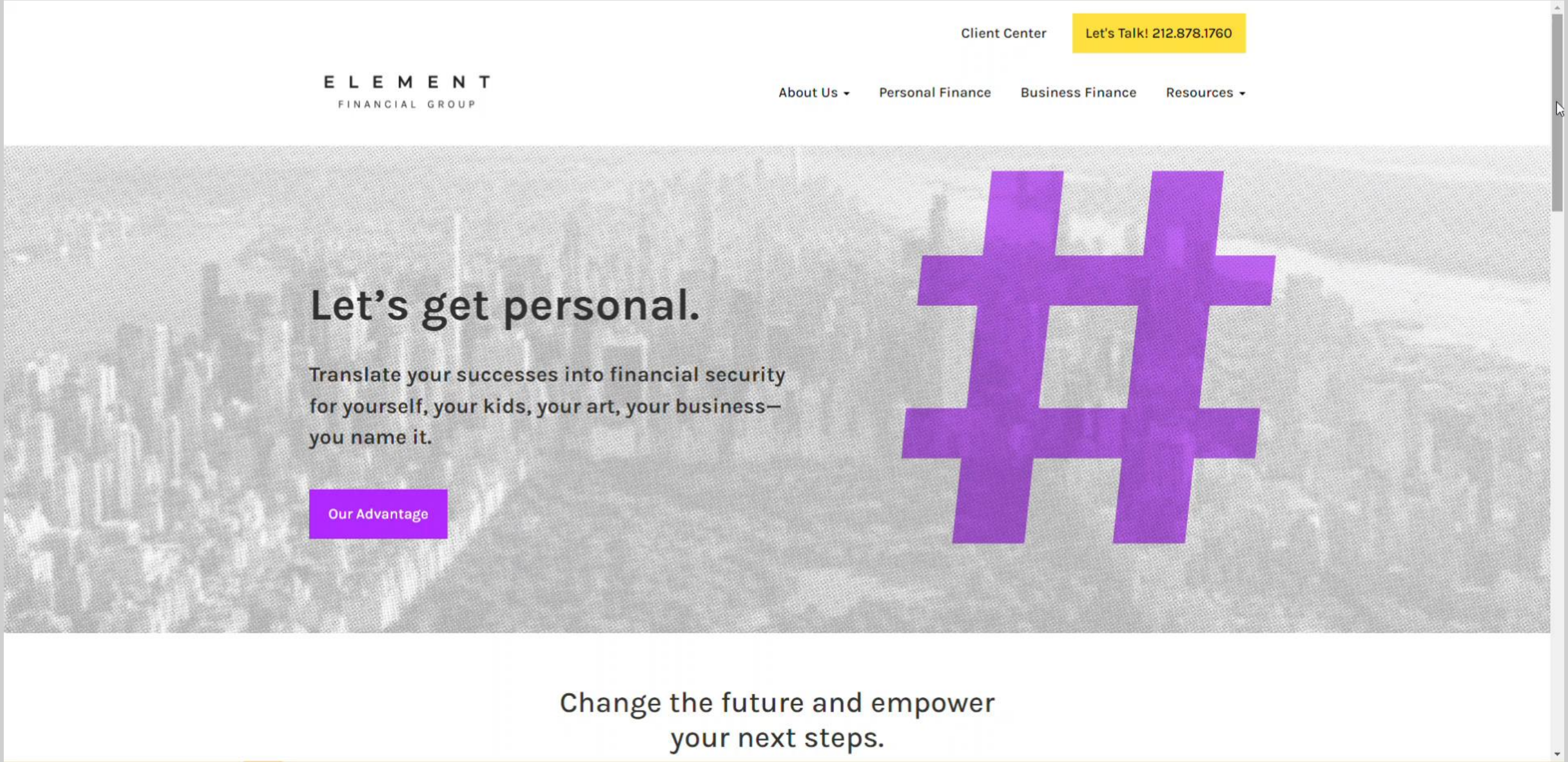
Sponsored by: Commonwealth Financial Network
Hosted by: ARA Third Thursday Committee

Third Thursdays
WOMEN in RETIREMENT

ELEMENT

FINANCIAL GROUP

Website


Client Center
Let's Talk! 212.878.1760
ELEMENT
FINANCIAL GROUP
About Us
Personal Finance
Business Finance
Resources
Let's get personal.
Translate your successes into financial security for yourself, your kids, your art, your business—you name it.
Our Advantage
Change the future and empower your next steps.

Client Onboarding Letter

Let's Get Personal!

We are delighted to begin working with you! As we start the journey, we have 3 steps for you to complete prior to our next meeting.

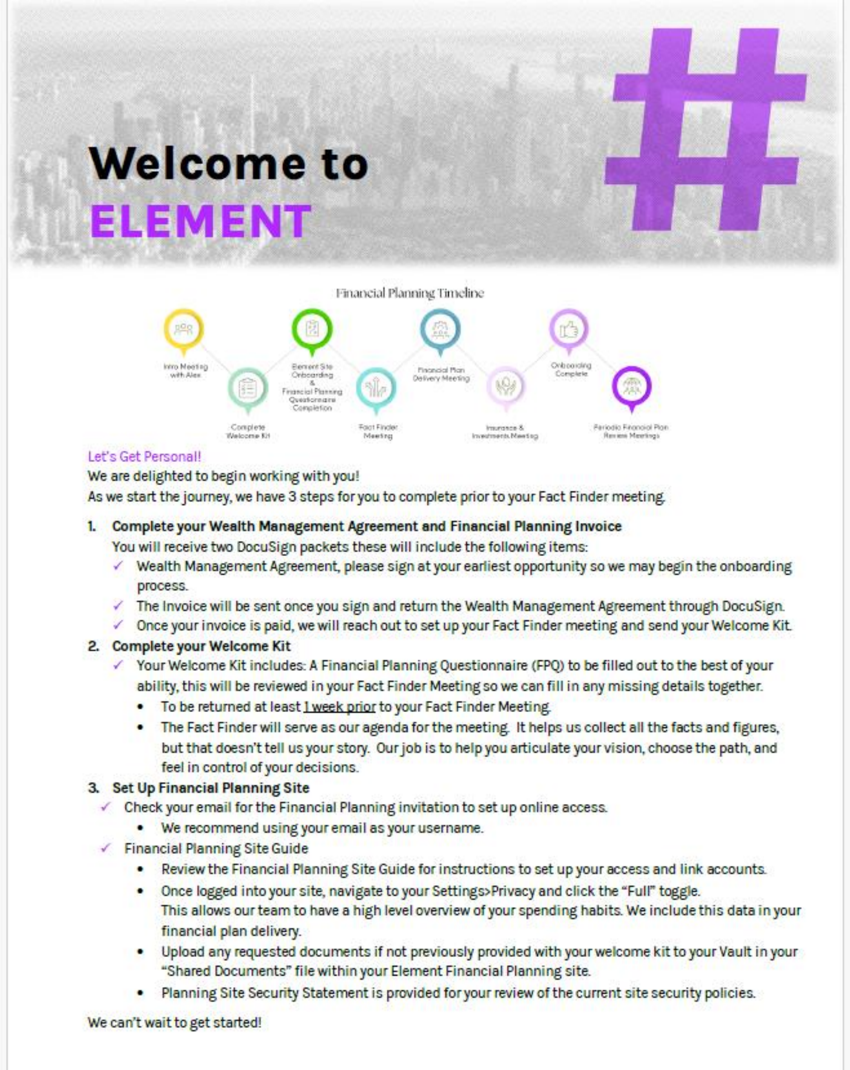
The boxes around text are clickable links to navigate through out this document.

1. Pay Financial Planning Invoice
   - ✓ This will allow us to get started doing what we love
2. Complete your Welcome Kit
   Included in your welcome kit are the following items:
   - ✓ Wealth Management Agreement, please sign and return
   - ✓ Financial Planning Questionnaire (FPQ) to be filled out to the best of your ability and returned via email or DocuSign to Element
     - To be returned at least 1 week prior to your Fact Finder Meeting
3. Set Up Financial Planning Site
   - ✓ Email Invitation Received from Planning Team
     - We recommend using your email as your username
     - See Financial Planning Guide for help with setting up your site
   - ✓ Financial Planning Site Guide Review
     - How to Access your Financial Planning Site
     - How to Add Accounts
     - Planning Site Security Statement
   - ✓ Upload the requested files in your FPQ to the Vault, in the Shared Documents file within your Financial Planning site

The Fact Finder will serve as our agenda for the meeting. It helps us collect all the facts and figures but it doesn't tell us your story. During the meeting, we will talk about life – your vision for yourself, your family, your future and your legacy.
Our job is to help you articulate your vision, choose the path, and feel in control of your decisions.

We can't wait to get started!

Internal Onboarding Letter



Welcome to ELEMENT

Financial Planning Timeline

Intro Meeting with Alex
Complete Welcome Kit
Element Site Onboarding & Financial Planning Questionnaire Completion
Fact Finder Meeting
Financial Plan Delivery Meeting
Insurance & Investments Meeting
Onboarding Complete
Periodic Financial Plan Review Meetings

Let's Get Personal!

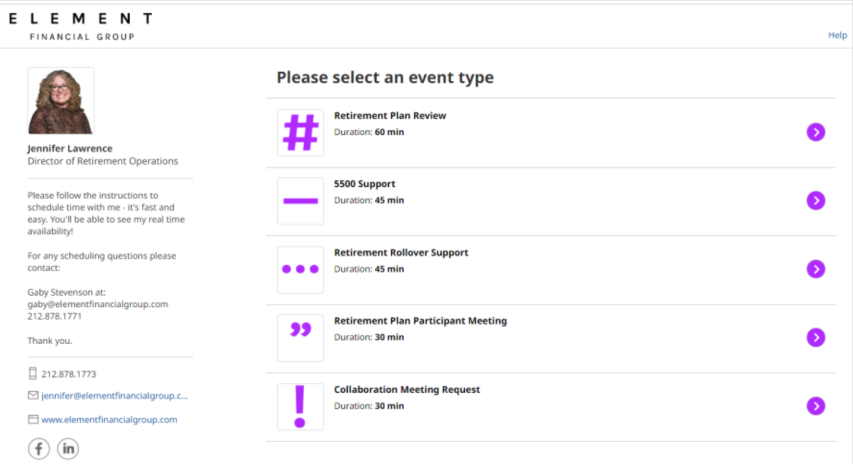
We are delighted to begin working with you!

As we start the journey, we have 3 steps for you to complete prior to your Fact Finder meeting.

1. **Complete your Wealth Management Agreement and Financial Planning Invoice**
   You will receive two DocuSign packets these will include the following items:
   - ✓ Wealth Management Agreement, please sign at your earliest opportunity so we may begin the onboarding process.
   - ✓ The Invoice will be sent once you sign and return the Wealth Management Agreement through DocuSign.
   - ✓ Once your invoice is paid, we will reach out to set up your Fact Finder meeting and send your Welcome Kit.
2. **Complete your Welcome Kit**
   - ✓ Your Welcome Kit includes: A Financial Planning Questionnaire (FPQ) to be filled out to the best of your ability, this will be reviewed in your Fact Finder Meeting so we can fill in any missing details together.
     - To be returned at least 1 week prior to your Fact Finder Meeting.
     - The Fact Finder will serve as our agenda for the meeting. It helps us collect all the facts and figures, but that doesn't tell us your story. Our job is to help you articulate your vision, choose the path, and feel in control of your decisions.
3. **Set Up Financial Planning Site**
   - ✓ Check your email for the Financial Planning invitation to set up online access.
     - We recommend using your email as your username.
   - ✓ Financial Planning Site Guide
     - Review the Financial Planning Site Guide for instructions to set up your access and link accounts.
     - Once logged into your site, navigate to your Settings>Privacy and click the "Full" toggle.
       This allows our team to have a high level overview of your spending habits. We include this data in your financial plan delivery.
     - Upload any requested documents if not previously provided with your welcome kit to your Vault in your "Shared Documents" file within your Element Financial Planning site.
     - Planning Site Security Statement is provided for your review of the current site security policies.

We can't wait to get started!

Brand Integration Scheduling



Brand Integration Email

Hi CLIENT NAME,

It was great meeting with you today. We wanted to recap our discussion, the action items, and the agenda for our next meeting.

Discussion Points:

- [Bullet point 1: Key discussion point 1]
- [Bullet point 2: Key discussion point 2]
- [Bullet point 3: Key discussion point 3]
- [Bullet point 4: Key discussion point 4]
- [Add more bullet points as needed]

Action Items:

- [Bullet point 1: Action item 1 assigned to responsible person with deadline]
- [Bullet point 2: Action item 2 assigned to responsible person with deadline]
- [Bullet point 3: Action item 3 assigned to responsible person with deadline]
- [Bullet point 4: Action item 4 assigned to responsible person with deadline]
- [Add more bullet points as needed]

Next Meeting Agenda:

- [Bullet point 1: Discuss topic 1]
- [Bullet point 2: Review progress on action items]
- [Bullet point 3: Present findings on project X]
- [Bullet point 4: Brainstorm ideas for upcoming campaign]
- [Add more bullet points as needed]

Please review the above information and let me know if there are any updates or additions that should be included. Feel free to add any additional discussion points or action items you believe we missed.

Thank you all for your time and looking forward to our next meeting. Should you have any questions or concerns in the meantime, please don't hesitate to reach out.

Best,

Jennifer Lawrence, AIF®, CPFA | Director of Retirement Operations
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W: www.ELEMENTFinancialGroup.com
To schedule a time with me, please click here.

Shout-Outs


Happy
Birthday
Thinking of you on your special day
ELEMENT
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From all of us
Congratulations
We're delighted to celebrate all of your special moments!
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Happy Birthday!
May this year bring you continued success and joy!
Your Element Team.
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Swag


#@!”
Let's get personal.


#@!”
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FINANCIAL GROUP


ELEMENT
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Social Media

Social Media

Branded Posts

Making Branding Personal

Company Culture

Thrive
MENTORING PROGRAM

I AM A MENTOR.
YOU COULD BE TOO.

AMERICAN RETIREMENT ASSOCIATION

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JANUARY 8-10, 2025

AUSTIN, TX

WOMEN in RETIREMENT Conference


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podcasts have a unique vibe and feature
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Save the Date!

Nov. 21st 4:30-6:00 pm ET

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