RightCapital New Client Checklist

A checklist is a wonderful thing. It is a helpful tool to address the essentials. While there may be additional elements, below are the essentials for setting up a new client.

- [ ] Create client and determine input process
  - [ ] Action: Create client. Choose advisor, client, or hybrid input (Adding a client)

- [ ] Profile (Creating plans and Completing your profile VIDEO)

Leverage the 6 steps to laying the foundation. Whether you're inputting the profile, the client is, or you're taking the hybrid approach and setting up a few cards to "prime the pump", these are the steps to achieve your goal. For more, watch Presenting RightCapital video.

  - [ ] Action: Set up client household and residence state (Family profile)
  - [ ] Action: Add salary and other income (Salary and other income)
  - [ ] Action: Set up client's savings plans for now through retirement (Savings)
  - [ ] Action: Set up assets and liabilities, including linking accounts (Net Worth)
  - [ ] Action: Add client's pre-retirement and local tax expenses (Expenses)
  - [ ] Action: Establish the goals of the client (Goals)
  - [ ] Bonus: Don't forget to add other assets (Creating plans)

- [ ] Build proposal

Your client has their current roadmap. Build a proposal to show them a better way. Your way.

  - [ ] Action: Review portfolio investment rate of return (Return assumptions)
  - [ ] Action: Review profile for accuracy and completeness
  - [ ] Action: Select client's preferred planning method (Planning methods)
  - [ ] Action: Develop client proposal using Action Items in the Analysis tab (Analysis)

- [ ] Client meeting

You've got the client's profile set and proposal built. Now let's prepare for the client meeting!

  - [ ] Action: Review proposal with your client (Client meetings best practices)
  - [ ] Action: Create any follow-up tasks for you and your client (Tasks)
  - [ ] Action: Print reports to share with client and save to vault (Reports and Vault)
  - [ ] Action: Invite clients to your portal (Inviting clients)

Do you feel ready? If not, drop a line with our team for some best practices.

Got questions? Contact us at support@rightcapital.com or chat with us!