What to Expect: Review Call

04/29/2025 8:12 am CDT

Family Office Client Success Review Call Guide

What is the Family Office Client Success Review Call?

The Client Success Review Call is a dedicated time for Advisors to connect with clients, review portfolio performance, discuss recent life changes, and explore any potential updates to the financial plan. It's also an opportunity to address client questions or concerns and ensure their financial strategy remains aligned with their goals.

When is the Client Success Review Call?

At a minimum, we like to meet with clients at least Annually. However, review frequency is based on your individual needs.

Importance of this Call

Regular check-ins help maintain strong client relationships, keep financial plans on track, and ensure that we stay aligned with each client’s evolving life circumstances and goals.

How to Schedule Your Review Call

You'll automatically receive an email with a scheduling link for your upcoming review. Simply click the link, choose a time that works best for you, and book your appointment. Once scheduled, our team will begin preparing for your review. Ahead of the meeting, there may be a few items for you to complete—we'll include everything you need in the email to make the process as smooth as possible.

Action Items Before Your Meeting

Once you schedule your review call, you’ll be redirected to a brief Client Update Form. This form helps us tailor the meeting to your needs by gathering any recent updates, questions, or concerns you'd like to discuss. We highly recommend completing it to make the most of our time together. After submitting the update form, you'll have the option to access an additional form if you need to make any updates to your financial planning information.

Agenda for this Call - (30–60 mins)

- **Welcome and Personal Update (5–10 mins)**
  - Quick personal catch-up (e.g., "How have things been lately? "Whats New?")
  - Discuss any recent life event changes (job, family, health, relocation, etc.)
  - Recap last meeting or touchpoint highlights.
- **Account & Portfolio Review (10–15 mins)**
  - Account Information Review.
  - Review portfolio performance (YTD, since inception,etc..)
  - Discuss current allocation and investment strategies.
  - Highlight upcoming deadlines (RMDs, IRA contributions, tax filings, etc.)
  - FG Investor Portal walkthrough or refresher. (if needed)
  - Risk Tolerance Review (if needed)
  - Review Client Quick Reference Guide (if needed)
- **Goals & Financial Planning Update (10–15 mins)**
  - Update Financial Plan information including goals status (retirement, home purchase, education, etc.)
  - Review Progress for both short-term and long-term goals.
  - Identify any new expected expenses or liquidity needs.
- **Client Questions & Concerns (5–10 mins)**
  - Address any questions, concerns or uncertainties.
  - Provide clarity, reassurance or educational support where needed.
- **Wrap-Up and Next Steps (5 mins)**
  - Summarize key takeaways and any action items.
  - Outline next steps, including submitting the plan to FG's Centralized Planning Team for review of potential opportunities (tax strategies, insurance, estate planning, etc.)

Post Meeting Action Items & Recommendations

- A follow-up email will be sent summarizing the meeting notes and action items.
- If new recommendations arise from the planning team's review, schedule a follow-up call to review these with the client.

What if I Miss the Call?

If a client is unable to attend the scheduled Check-In Call, no worries, we'll happily reschedule at their earliest convenience.