

Client meeting preparation

Automatically prepares comprehensive client meeting packages by gathering portfolio data, risk assessments, and planning documents. Reduces advisor preparation time by 75% while ensuring all relevant client information is current and accessible.

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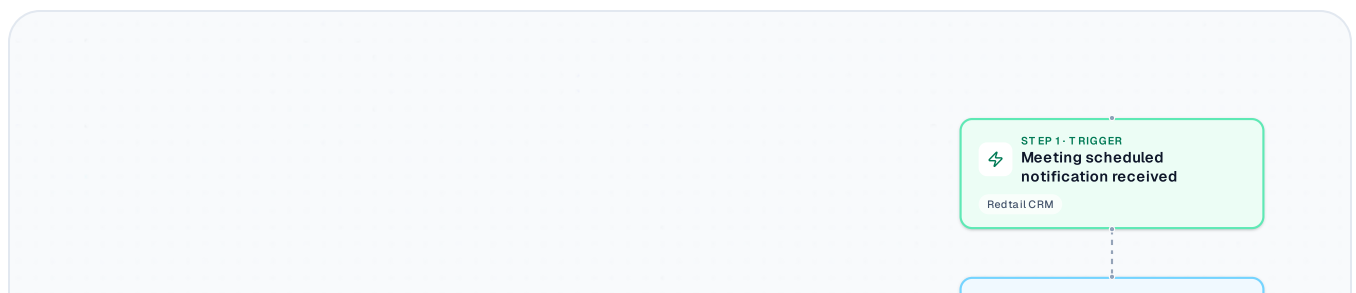


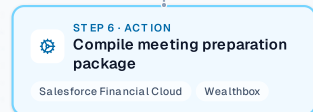
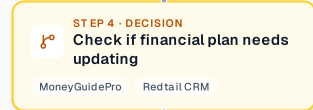
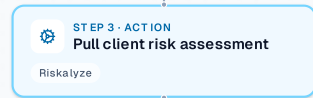
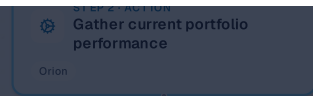
WORKFLOW TRIGGER

Client meeting scheduled in CRM system within next 48 hours

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Meeting scheduled notification received

Workflow activates when a client meeting is scheduled in the CRM system. System captures meeting date, client ID, and meeting type for preparation.

Redtail CRM

2

⚙️ ACTION

Gather current portfolio performance

Retrieves latest portfolio holdings, performance metrics, and asset allocation data for the specific client. Generates current valuation and performance summary.

Orion

3

⚙️ ACTION

Pull client risk assessment

Fetches most recent risk tolerance questionnaire results and risk capacity analysis. Identifies any changes since last review.

Riskalyze

4

🔗 DECISION

Check if financial plan needs updating

Analyzes if client's financial plan is older than 12 months or if major life events have been recorded. Determines if plan refresh is needed before meeting.

MoneyGuidePro

Redtail CRM

5

Generate updated financial projections

Creates refreshed financial planning scenarios and goal progress tracking if plan update was needed. Updates retirement and savings projections based on current data.

MoneyGuidePro

6

 ACTION

Compile meeting preparation package

Assembles all gathered data into a structured meeting agenda with talking points. Creates client-facing summary and advisor preparation notes.

Salesforce Financial Cloud

Wealthbox

7

 OUTPUT

Deliver meeting materials to advisor

Sends comprehensive meeting package to advisor's inbox and updates client record. Package includes performance summary, risk review, and suggested discussion topics.

Salesforce Financial Cloud



Outputs

AI Business OS

- Comprehensive client meeting package
- Updated portfolio performance summary
- Risk assessment review
- Financial planning projections
- Meeting agenda with talking points



Key Metrics

- Advisor preparation time reduction
- Meeting preparation accuracy score
- Client satisfaction ratings



Tools & Integrations

- Redtail CRM
- Orion
- Riskalyze
- MoneyGuidePro
- Salesforce Financial Cloud
- Wealthbox

AI Business OS

AI Business OS

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