Creating value

Presented by Samadhi Pineda
SAMPLE
Collaborative planning driven by your goals

Your customized wealth management plan is created through our planning process and adapts as your needs evolve.

1. Your goals start our discussion
2. Your unique situation is comprehensively and systematically analyzed
3. Your plan is crafted by using what we learn from you; our advice is intended to help meet your goals
4. Your continued progress is how we measure our success

YOU

EVOLVE

UNDERSTAND

ADVISE

ANALYZE
Sample Servicing Blueprint for Client Meeting

- **Physical evidence**: Parking, Elevator, Office Environment, Reception Area, Meeting Rooms, Restrooms, Guest Workstation, Gifts, Beverages and Snacks

- **Customer Actions**: Arrive at Private Banking office, Wait time in the lobby, Meet in the conference rooms, Sign Paperwork

- **Onstage/Visible Employee Actions**: Setup and clean up of conference rooms, greet clients, present paperwork

- **Backstage/Invisible Employee Actions**: Open account, perform money movement, print account documentation

- **Support processes**: Account opening system, Transfer system
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