COVISUM

Delivering **Value** to Clients

- Review client documents
- Sync client data from your client relationship management tool, portfolio risk management tool and financial planning tool
  - Enter client data into your client relationship management tool
  - Enter client data into your portfolio risk management tool
  - Enter client data into your financial planning tool
- Cross check assumptions between your multiple tools
- Review realistic expense and income figures with client
- Discuss potential future expenditures
- Review data entered into planning tools, make any necessary changes and return client documents
- Enter Social Security information into Social Security Timing and determine the best claiming strategy
- Create 'what if' scenarios and stress test plan
- Review cash flow projections
- Generate and print financial plan, Social Security Timing report, Tax Clarity report, portfolio risk report, and overall income plan
- Write and print narrative
- Assemble in a binder to present to the client
- Prepare for online interactive presentation

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