90-day onboarding process

JJET Investment Group

(617) 725-2000
us.rbcwealthmanagement.com/jjetinvestmentgroup

Change isn't always easy. That is why we are committed to making the process of becoming a client as smooth as possible for you. We will be there with you striving to make the unfamiliar become familiar. Moreover, while we are always attentive to our clients' needs, we do feel that the first 90 days are especially critical. That is why we commit extra attention to this time period.

- We help you complete the paperwork associated with becoming an RBC Wealth Management client.
- We provide you with a customized retirement plan based upon your risk tolerance, goals and needs.
- We will confirm the transfer of each asset.
- You are contacted to confirm when the investment programs are funded.
- When the first monthly statement is produced, we are happy to review it and ensure that you understand every aspect of the statement.
- We will walk you through the navigation of our online account system and aggregation tool.
- We will introduce you to our team members.
- We offer a third-party disclosure to your accountant.
- We request a trusted contact information—someone we can contact if we are unable to reach you.
- We allow for verbal authorization for wires, checks and third-party disbursements.

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