Client IMPACT System

New client experience

Wealth Management

Intro | Discovery | Preparation | Implementation | Sustainment

Intro

- Introduce team and firm capabilities
- **Introduce IMPACT System**
- Introduce process
- Identify client needs and expectations
- **Provide RBC WealthPlan forms**
- FIT process

Step 1

- If invited, initiate discovery
- Confirm understanding
- Discuss our commitment to you
- Client referral process
- If not invited, provide recommendation for next steps

Step 2

- Begin discovery
- Gather and analyze current portfolio
- Confirm client expectations
- **Begin building WealthPlan**
- Begin opening accounts

Step 3

- Complete discovery
- Assign segmentation and service-level assignments
- **Begin working on IMPACT book and box**
- **Continue working on WealthPlan**
- Begin transferring accounts

Step 4

- WMO portal registration
- Verify standard account structure is established
- Monitor account transfers
- **Continue work on IMPACT book and box**
- **Complete WealthPlan**

Step 5

- Prepare strategies
- **Prepare retirement income plan**
- **Screen for asset management plan**
- **Refine IMPACT book and box**

Step 6

- Implementation meeting
- **Present WealthPlan**
- Review client referral process
- **Finish IMPACT book**
- Initiate client foundation items
- Track transfers

Step 7

- Finalize asset transfers
- **Initiate IMPACT report**
- **Finalize IMPACT box**
- Begin connecting with trusted COI network
- Begin investing transferred assets

Step 8

- Initiate sustainment operations
- Complete investing of transferred assets
- Schedule first quarterly review

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