



Advisor's Alpha >

Client Expectations Builder

Set the tone for a successful relationship

Create a fully personalized piece that expresses your commitment and helps new clients understand the nature of a successful advisor-client relationship.

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ABC
ADVISORS
Jane C. Smith, CFP®

Prepared for:
Mr. and Ms. John and Jane Doe

How to get the most value out of your advisor relationship

Here are some practical tips to consider as you begin your new relationship with me as your financial advisor.

PRACTICAL QUESTIONS TO ASK

- What services do you provide?
- What can I expect from you?
- How often will we meet?
- What are you compensated?
- When will you contact me?
- How often do we review my portfolio and performance?
- How often do we review progress



Best practices guide and sample
Practical tips and sample output help you create compelling, convincing, targeted client communications.

[Guide](#) [Sample](#)

