

Accounting Procedures

- Accounts Payable
- Accounts Receivable
- Banking Payroll
- Petty Cash

Advocate Service

- Overview
- Setting up a New Client
- Managing On-going Activities
- Managing Timeline Activities
- Article of Interest
- Annual Anchor Process
- Birthday Card
- Call Rotation
- Annual Client Event
- Client Recognition Card
- First Views - Monthly E-mail
- Moments of Truth
- Review Meetings

Client Advisory Council

- Getting Started (45 days before)
- Prepare for the meeting (20 days before)
- After the meeting (2 days after)

Computer Hardware

- Computer Hardware

Computer Software

- Business Development Relationship Management
- Back Office Software (before writing this use back office manuals)

- Client Transactions (before writing this use back office manuals)
- Data Backup Procedures
- E-mail
- Word Processing

Letter Writing Guide

- Letter Writing Guide

Office Procedures

- Filing
- Inventory
- Kitchen and Supplies
- Mail and Courier
- Reception

Planning Process

- Overview
- Client Process #1 - General Interest
- Client Process #2 - Is There A Fit?
- Client Process #3 - 2nd Appointment
- Client Process #4 - Prepare the PFPS
- Client Process #5 - 3rd Appointment
- Client Process #6 - 4th Appointment
- Client Process #7 - New Client Welcome

Reporting

- Preparing Weekly Business Report
- Quarterly Reporting
- Reporting for Annual Business Review

Transaction Procedures

- Insurance
- Mutual Funds
- Stocks