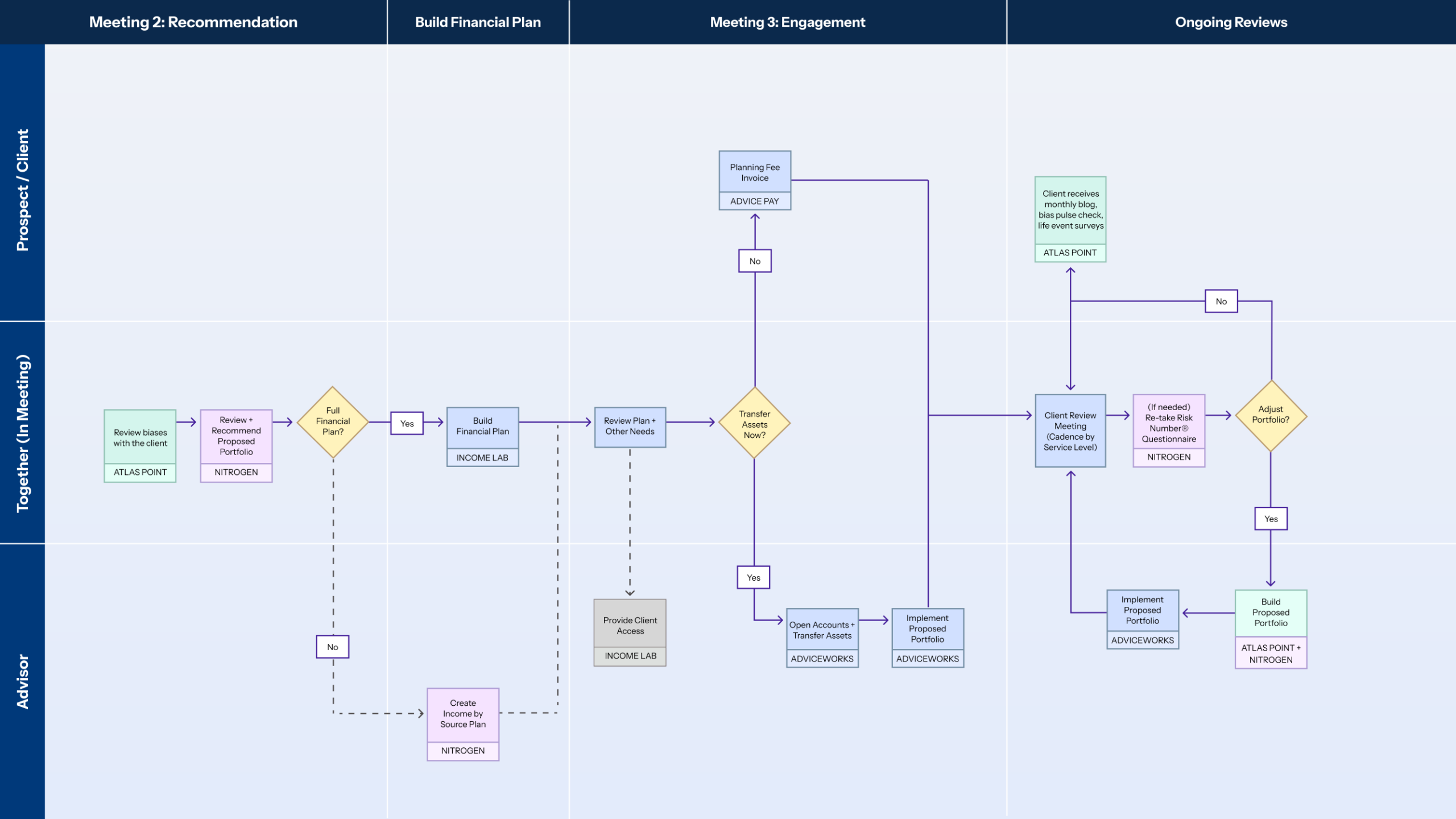
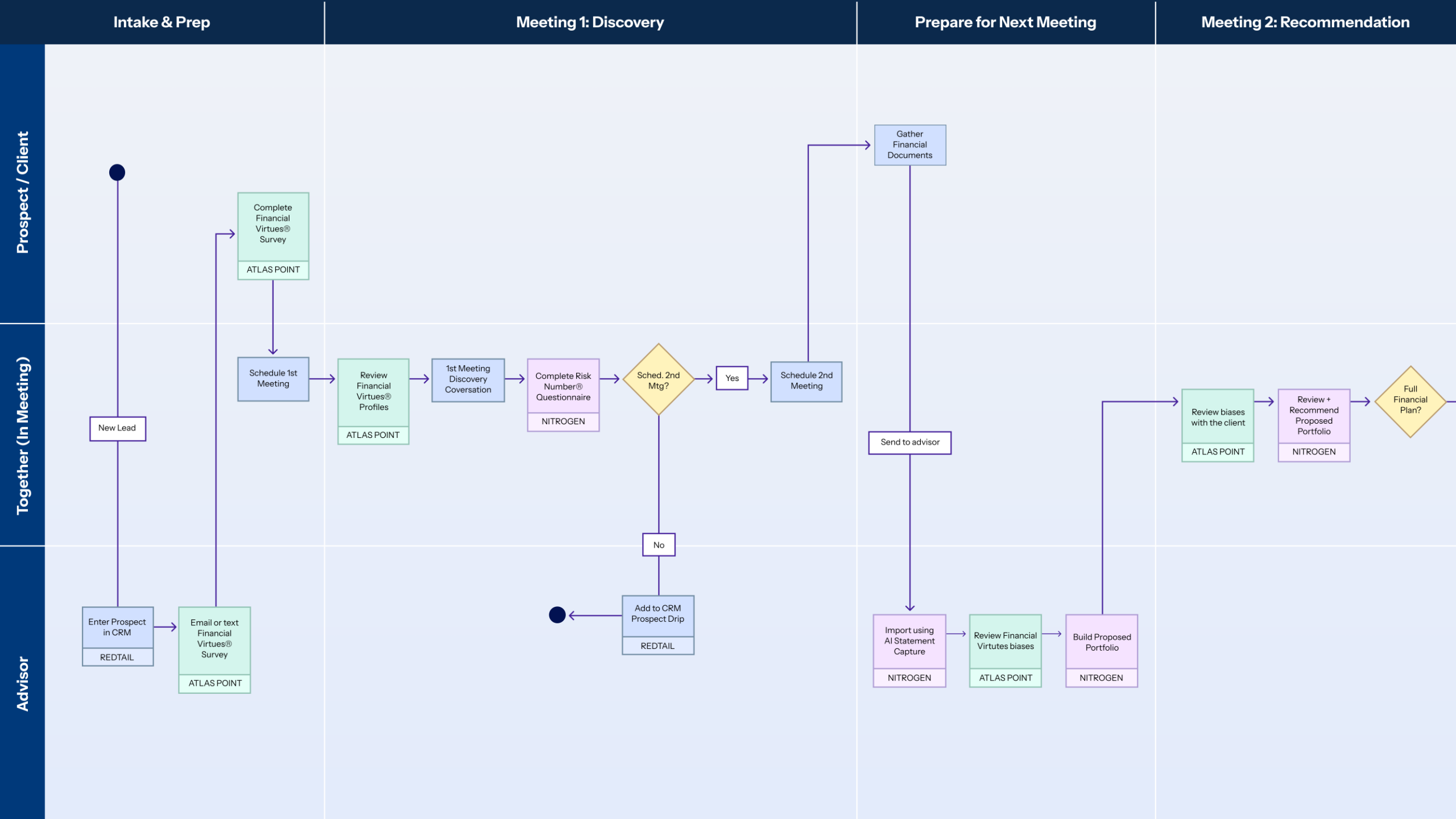

Meeting 2: Recommendation
Build Financial Plan
Meeting 3: Engagement
Ongoing Reviews
Prospect / Client
Together (In Meeting)
Advisor
Review biases with the client
ATLAS POINT
Review + Recommend Proposed Portfolio
NITROGEN
Full Financial Plan?
Yes
No
Build Financial Plan
INCOME LAB
Create Income by Source Plan
NITROGEN
Review Plan + Other Needs
Provide Client Access
INCOME LAB
Planning Fee Invoice
ADVICE PAY
No
Transfer Assets Now?
Yes
Open Accounts + Transfer Assets
ADVICEWORKS
Implement Proposed Portfolio
ADVICEWORKS
Client receives monthly blog, bias pulse check, life event surveys
ATLAS POINT
No
Client Review Meeting (Cadence by Service Level)
(If needed) Re-take Risk Number® Questionnaire
NITROGEN
Adjust Portfolio?
Yes
Implement Proposed Portfolio
ADVICEWORKS
Build Proposed Portfolio
ATLAS POINT + NITROGEN


Intake & Prep
Meeting 1: Discovery
Prepare for Next Meeting
Meeting 2: Recommendation
Prospect / Client
Together (In Meeting)
Advisor
New Lead
Complete Financial Virtues® Survey
ATLAS POINT
Schedule 1st Meeting
Review Financial Virtues® Profiles
ATLAS POINT
1st Meeting Discovery Coversation
Complete Risk Number® Questionnaire
NITROGEN
Sched. 2nd Mtg?
Yes
Schedule 2nd Meeting
Gather Financial Documents
Send to advisor
Review biases with the client
ATLAS POINT
Review + Recommend Proposed Portfolio
NITROGEN
Full Financial Plan?
No
Add to CRM Prospect Drip
REDTAIL
Enter Prospect in CRM
REDTAIL
Email or text Financial Virtues® Survey
ATLAS POINT
Import using AI Statement Capture
NITROGEN
Review Financial Virtues biases
ATLAS POINT
Build Proposed Portfolio
NITROGEN