What to Expect: Check-In Call

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Tags: Check-in Call Client Success Team Client Servicing

Family Office Client Success Check-In Call Guide

What is the New Client Check-In Call?

The New Client Check-In Call is a follow-up conversation designed to give clients the opportunity to ask questions, share any concerns, and ensure they feel supported since their initial onboarding. The goal is to build trust, clarify points of contact, and confirm the client has access to all necessary resources and systems.

When is the Client Check-In Call?

We offer this New Client Check-In call 30 days after the account(s) have been opened.

Importance of this Call

This meeting is designed to ensure the client is set up for success with their experience with Financial Gravity. Regular check-ins help maintain strong client relationships, keep financial plans on track, and ensure that we stay aligned with each client's evolving life circumstances and goals.

How to Schedule Your Review Call

You will automatically receive an email with a scheduling link for this New Client Check-In Call 30 days after your first account is opened. Simply click the link, choose a time that works best for you, and book your appointment.

Action Items Before Your Meeting

Make notes of any questions or concerns you'd like to discuss during this call.

Agenda for this Call - (30–60 mins)

- **Welcome and Meeting Overview (5 mins)**
  - Quick recap of the purpose of the call.
- **Client Questions & Concerns (5–10 mins)**
  - Address any questions, concerns or uncertainties.
  - Provide clarity, reassurance or educational support where needed.
- **Review Account Information (5 mins)**
  - Account Information Review - Confirm contact information, account registrations and beneficiaries are correct.
- **Review Client Quick Reference Guide (10-15 mins)**
  - Financial Gravity Resources.
  - Who to contact.
  - Access to our systems.
- **Next Steps & Open Q&A (5-10 mins)**
  - Discuss future meetings, deliverables, or action items.
  - Answer any remaining questions.
  - Ensure the client feels confident moving forward.

What if I Miss the Call?

If a client is unable to attend the scheduled Check-In Call, no worries, we'll happily reschedule at their earliest convenience.

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