

# Learn how Advisors are using the planning process to strengthen client relationships



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# Agenda

- Review survey results
- Ways to use Snap in your business
- Processes and decision-making frameworks
- Resources to help

# Survey Results

Which of the following are you currently doing in your practice?

Providing plans to clients who have come to you with questions

74%

Proactively offering clients the option for a financial plan

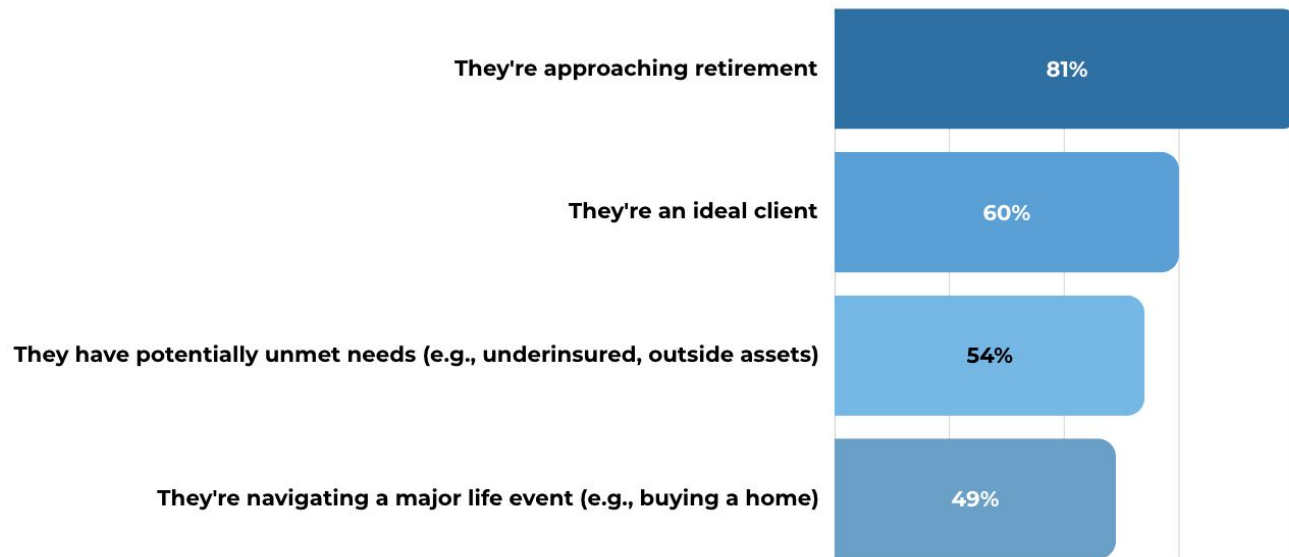
68%

Meeting with prospects

47%

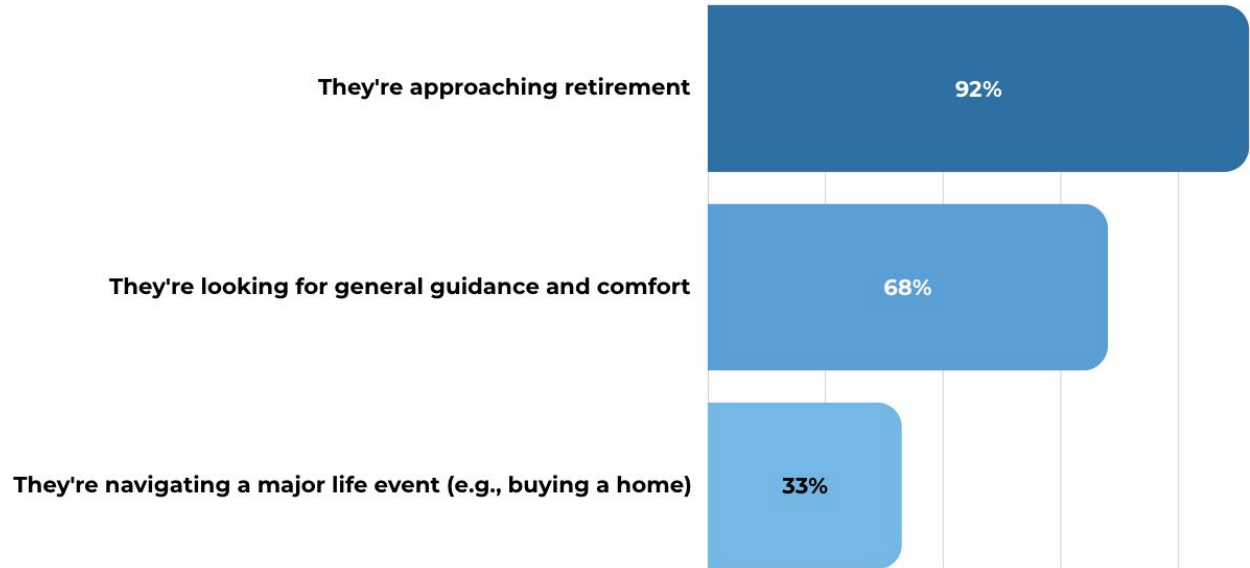
# Survey Results

## Clients selected for plans



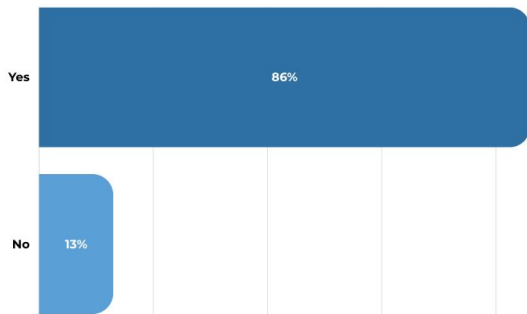
# Survey Results

## Clients asking for help



# Survey Results

## Using Snap with prospects



## Reason for No

I don't have the capacity

63%

I hadn't considered it

33%

Too much time to invest

48%

# Survey Results

- **What has been the most impactful use of Snap for your practice?**
  - Answering client questions.
  - Providing peace of mind.
  - Expanding the advisor and client relationship.
  - Earning new clients.
- **Top features in Snap to achieve these results:**
  - Recommendations
  - Comparing Scenarios
  - Interactive Charts
  - Reports (including Snapshots)
  - Stress Testing

# Value and Constraints of Planning

- Business reasons to offer a financial plan:
  - Convert prospects
  - Increase retention
  - Expand your relationships
  - Generate referrals
- Constraints of planning:
  - Time
  - Expertise (both planning and software)
  - Client interest

# Finding Time

- Snap was built to create plans within minutes rather than hours.
- Take advantage of resources to streamline the planning process (e.g., the client questionnaire, identify client cohorts).
- Identify clients where the new business (referrals or an expanded relationship) would pay for itself, allowing you to expand your team or outsource the planning work. Snap has sharing capabilities for teams
- Replace other activities with planning to achieve the same outcome more efficiently (e.g., create plans for prospects to increase conversion).

# Developing Expertise

- Group your clients into cohorts that may require similar planning work that you're comfortable providing. Completing similar plans will help you develop expertise in the area and greater comfort with Snap. It will also streamline your delivery process and save you time.
- Examples of cohorts include:
  - Pre-retirees looking for readiness assessments.
  - Retirees looking for drawdown guidance.
  - Younger clients wondering about insurance needs.

# Gaining Client Interest

- Take advantage of resources to illustrate value to clients (e.g., sample plans that illustrate a similar situation to theirs, a value of planning document).
- Minimize the upfront work for the client. Have them fill out the questionnaire with everything that's top of mind and leave the rest blank. Schedule a follow-up meeting for the rest.
- Collaborate with your client so that they feel it's their plan.
- Focus on how you'll answer their questions.

# Plans to Consider

- Current plan (what would happen on their current path).
- Recommended plan (what additional actions and optimizations can help them achieve).
- Stress tested plan (what would happen if life deviates from the plan (unexpectedly or intentionally)).
  - Returns are variable and/or lower than expected
  - Income and savings are lower than expected
  - Forced to take time off work
  - One client passes away early
  - Retire early
  - Downsize family home at retirement

# Creating an implementation plan

- Move beyond presenting the plan but to create a clear action roadmap
- Define what to do, when to do it, and key milestones
- Schedule regular check-ins to keep the plan dynamic
- Use life events as opportunities to revisit strategy

# Create a Consistent Planning Framework

- Plan → Recommendations → Implementation → Follow-up
- Show clients a clear, structured journey
- Stay organized with repeatable processes
- Deliver consistent value over time
- Use tools to support ongoing client guidance

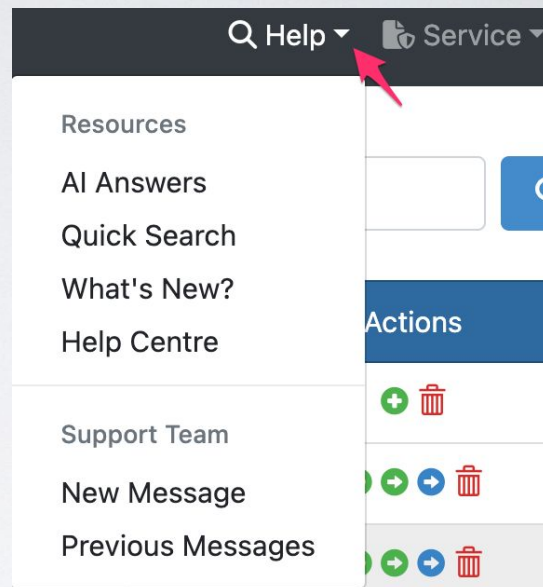
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# Thank You!

We're happy to help when you have questions or feature requests.



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