



“How can I engage more frequently and effectively with clients on the topics they care about most?”

Client (Re)Engagement

whealthcare
PLANNING

Better client engagement often means having new conversations about topics not yet addressed by an advisor.



Most clients are concerned not just about portfolio performance, but also about the financial implications of their family's health and longevity.

How can an advisor engage more effectively on the health and longevity-related topics that we know matter most to clients?

By utilizing Whealthcare Planning's suite of innovative **client discovery assessments**.



The **Whealthcare Planning** assessments help advisors to confidently and comfortably engage with individuals and families on a broad range of financial, health, and longevity-related topics.

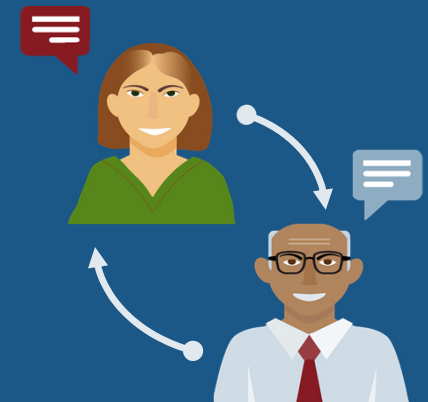
The assessments ask the hard questions, so the advisor doesn't have to. They are administered digitally and can be completed by a client at their convenience. Most take less than 5 minutes.



When a client is finished the advisor receives a report containing a personalized list of **next best actions (NBAs)** along with the relevant **Financial Wellness score**.

The next best actions and scores make it easier for advisors to engage with clients in areas like estate planning, family caregiving, or long-term care cost management.

These interactions can be the catalyst for subsequent conversations about additional financial advice and product offerings.



These digital engagements can be provided at scale without the need for any specialized knowledge or training.