

Advisory Client Review Kit

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds an advisory client review kit — goal progress, portfolio performance, rebalancing, life changes and action items — with the documentation to keep for suitability and a way to frame the behavioural-coaching value you add. Use this to run periodic reviews that deepen trust. For a mutual-fund-specific review report use the Portfolio Review Report.

Purpose of this tool & output

Periodic reviews that deepen trust

How the output is used

Use the kit to run periodic advisory client reviews that deepen trust and surface new needs.

Important cautions

AI-generated kit; align to your regulatory status and suitability duties.

Companion documents

- Financial Plan Builder
- Goal-Based Planning Calculator
- Risk Profiling Questionnaire
- Asset Allocation Advisor
- Investment Tax Planning
- Estate & Succession Planning

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.