Elements®

Scripts for Introducing Elements

How to explain what Elements is to clients:

Elements is a set of financial indicators that give us an overall view of the key areas of your financial health. These measurements help us to answer questions like:

- Are you taking the right amount of risk?
- Are you using your income wisely?
- Do you have the right mix of assets?
- How much wealth do you need to make work optional?

You can think of the Elements much like vital signs at a doctor's office. They help us figure out how you're doing financially and in what areas we should focus our time to help you progress towards your goals.

Explaining why it's important

As we identify and make progress towards your goals, Elements helps us understand and track that progress, making sure we're doing so in a healthy way.

By measuring and tracking these areas of your financial health, we can quickly see where adjustments need to be made, allowing us to be more decisive and deliver recommendations proactively.

Ultimately, Elements will help us ensure that you're set up for success and that you're making improvements in your financial health.

Explaining how it will work for clients you have already completed a profile for:

You'll start by downloading the Elements mobile app and creating your profile. If you would like to connect your accounts so they update automatically, please do so by hitting the "connect account" button.

All of your net worth details should be in the app. If you find that some accounts are missing or need to be updated, please update them.

We'll use the information here in Elements to track progress, make sure you are achieving your goals and know that you are on the right track.

Explaining how it will work for clients that will onboard themselves to the Elements system:

I'll send an invite to Elements so you can onboard yourself. You can do complete this process on your phone or on your computer. If you can't complete your information in one sitting, please return to my.getelemens.com to finish onboarding.

After your profile is complete, our team will assess how you're doing and start creating a plan of action with you.

Once we've taken care of the important and urgent things up front, we'll engage with you at least quarterly to track your progress toward increasing your net worth and accomplishing your goals.

Establishing expectations:

As we continue working together, it's important that your data is maintained and up to date.

Each quarter, you will receive prompts through the app which will encourage you to update your information. Please follow these steps, and as you do, it will make answering questions that come up periodically faster and make our quarterly meetings more productive.