ENGAGE

Russell Investments

The relationship between an adviser and their client requires an in-depth understanding of an individual's entire personal and financial situation to help ensure you get it right.

It also takes time and knowledge. Being efficient with your time and having access to the right insights and expertise is critical in ensuring you and your clients reach their desired outcomes.

Enhance your client service offering

We can't create more hours in a day, so it is critical to find out how we can find the right mix of activities for the right clients efficiently.

A solution to this common problem is to build your service model by identifying the communications you can deliver to the majority of your clients. Identify the different communication channels you plan to use and then overlay the personal reviews you anticipate having with the client.

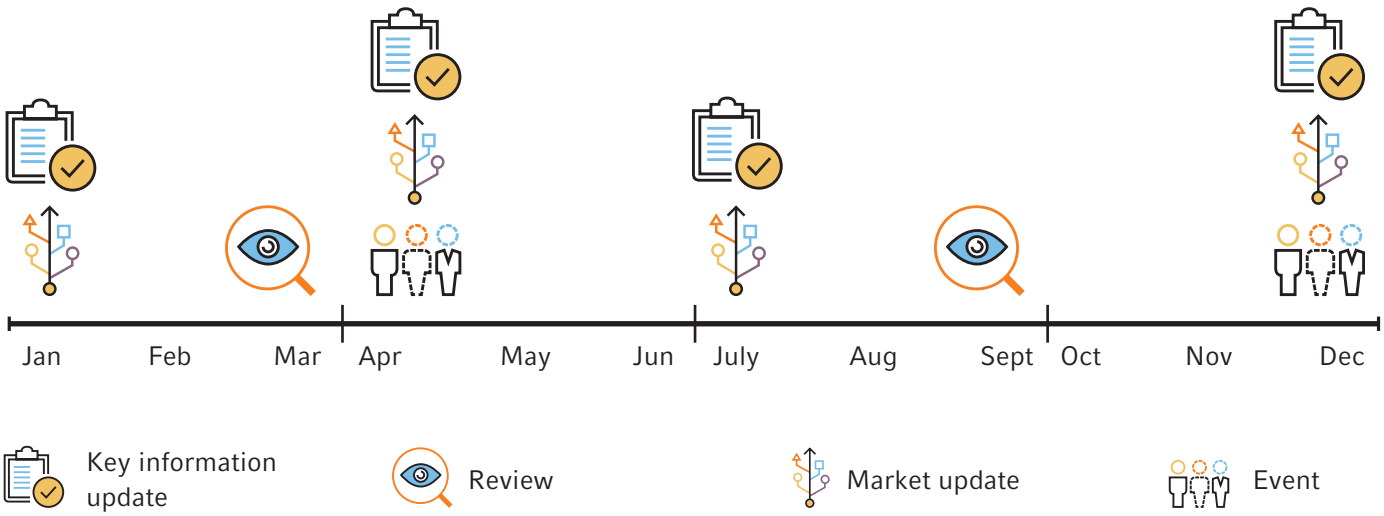
Consider using a Client Engagement Road Map. Clients need guidance in orchestrating their complex investment and retirement plans. The Client Engagement Road Map positions you as the coordinator. Helping your clients articulate and then document their goals and objectives is a critical function.

Your Client Engagement Roadmap also becomes your communication plan. It can help you position materials and information, to provide a consistent value-add experience for your clients and will highlight the benefits you deliver.

By spending time developing the process and repeatable elements of your service model, clients begin to understand the additional service they are being delivered. It will also provide them with a clear expectation of what to receive and when. This can help them stay on track to reaching their desired goals.

Client Engagement Roadmap

Here's an example of what that could look like.



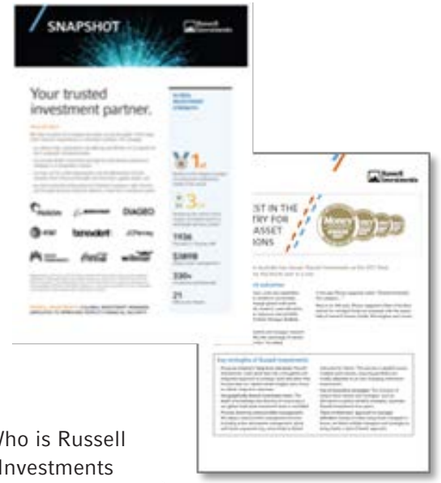
Here's how we can help...

Build your own Adviser roadmap to help you organise and prepare the insights and information you need to efficiently run your business throughout the year.

RISE[RI] Our adviser-centric experience provides premium investment and business solutions.

Giving you access to the latest insights, expertise and advice to enable you to build your business and elevate your client service. Let's enhance your client engagement roadmap and help you navigate your client conversations and reviews.

Engagement and education



Who is Russell Investments

Fund information & Portfolio transparency

Market updates

Investment, business & client insights

Face to Face Review

Adviser roadmap

For the sixth year in a row Russell Investments was chosen as Money magazine's 2019 Best of the Best Gold winner in the Multi-Sector Fund category.

IMPORTANT INFORMATION

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