The Referral Process

Our Commitment to Rapid Response and Excellent Service

At Wealth Enhancement, we seek to provide each client with an extraordinary level of attention and service. This commitment begins during the referral process. When you have a client who might benefit from our comprehensive wealth management services, here's what you can expect.

STEP 1:

Start by making a referral.

STEP 2:

Our Internal Sales Specialist will reach out to confirm we've received the referral and collect details about the client.

STEP 3:

Our Internal Sales Specialist will reach out to set up an intro meeting with your Regional Vice President and your client. This is our chance to get to know the client and learn about their financial goals. You are welcome to be part of that conversation.

STEP 4:

After the introduction meeting, our support team will work with the client to gather the information we will need to build an initial financial plan.

STEP 5:

Our team will develop the client's preliminary plan. It usually takes one to two weeks to craft a thoughtful, customized plan.

STEP 5.5:

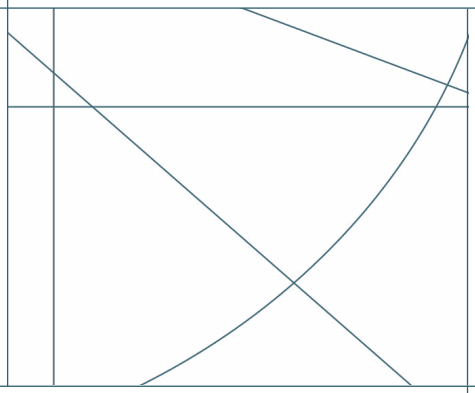
Our Internal Sales Specialist will schedule the presentation meeting with your Regional Vice President and the client (in-person is preferred). The client's Wealth Enhancement Financial Advisor will attend, as well. As always, we encourage you to join us if you'd like.

STEP 6:

Wealth Enhancement will hold a plan presentation meeting to walk the client through our discoveries and ideas. Additional specialists might join us to share their thoughts.

STEP 7:

Once they get a firsthand look at our planning capabilities, many clients hire us on the spot. For those who want to take their time to decide, we will follow up within a week to touch base.



When a client agrees to hire us, we extend a warm welcome to our family. We begin the onboarding process, and the RVP completes the transition to the client's long-term financial advisor. Throughout this journey, our team will keep you updated. Again, your active involvement will help to streamline this transition. Thank you for partnering with us!

Connect with our team.

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Wealth Enhancement®

Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor and affiliate of Wealth Enhancement Group®.