



Vanguard®

Client
relationships

Client relationship profile



	Client name	Client name	Other decision maker
Contact information			
Goals and drivers			
Topics of interest (market, economy, philanthropy, etc.)			
Desired content depth (high-level, detailed, etc.)			
Learning style (visuals, stories, data etc.)			
Preferred communications approach (phone, email, mail, social media, etc.)			
Additional details			



Visit our Practice Management Centre for more information on Vanguard Advisor's Alpha™, wealth management and navigating client relationships.

Connect with Vanguard® > vanguardcanada.ca > 888-293-6728

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