Over the past two years, I have had the pleasure of working with many of our clients and re-designing our client engagement process. As our firm continued to experience growth and the access to technology rapidly increased, we knew that specific updates needed to be made in how we provided information to our clients.

For the past forty years, we have remained steadfast in our commitment to be “educators first,” always taking a proactive stance when it comes to client service and using every conversation as an opportunity to empower families to make sound decisions for their future. Today, our mission continues to evolve and as an adjunct to your existing interactions, we are building a robust self-service model that will enhance access to account information, streamline appointment booking, enable online collaboration and deepen client access to customized educational material.

As we move into the second half of 2016, you will begin to see these initiatives rolled out and become an integral part of our everyday operations in 2017. It is our goal to have the client’s voice drive how the client engagement process evolves, so we will be soliciting your feedback at every step, and ultimately, you will see the program adapt to meet relevant topics that directly impact your decision making process with respect to Investment and Retirement Planning.

Here is an overview of the major milestones that we intend to roll out in order to enhance our client engagement process:

1. Connect2Clients: An email tool used to distribute monthly market updates and team members’ perspectives on relevant topics that impact our clients in today’s market. We have been testing this system with great success since the summer of 2016 and will continue to enhance it over the coming months, thus rolling it out to our entire client base in 2017.
2. E-Scheduling: Enabling our clients to schedule appointments electronically either through our appointment notifications distributed through the Connect2Clients system or by visiting our website. We anticipate piloting this process in the latter part of 2016 with full implementation in the first part of 2017.
3. Video Conferencing: We have piloted this tool over the past several years with some success; however, we are moving to a more expansive platform that will enable smoother connection and enhanced collaboration. It is our goal that in 2017, we will be able to provide every client who has internet access the ability to meet with us in a virtual manner and involve other family members who are in different locations. We feel that this is a very important tool as families move towards a more integrated approach to legacy and retirement planning.
4. Educational Series: Our group will be launching a quarterly series either through video conferencing or conference call that will provide our clients with a market update and then a presentation on a specific topic related to Investment and Retirement Planning. We will have industry experts join this call and collaborate with us to deliver these sessions in a concise, but powerful manner. These sessions will be recorded, so that clients who are unable to attend or would like a family member to listen can do so.
5. Enhanced Educational Portal: We are in the process of designing and launching a robust educational tab on our website that will allow us to provide clients with specific online classes, videos, articles and other presentations related to relevant Investment and Retirement planning topics. It is our hope that this will become a central tool for our

“educators first” philosophy as we move through the client engagement process. We expect this tool to be rolled out in early 2017 and it will continue to be updated on an on-going basis.

6. Lock-Box Client Portal: A secure central repository that each client will have access to in order to obtain information regarding their accounts and store important information such as wills/trusts, as well as a place where we can upload reviews prior to our meetings.

At Costanzo Financial Group, we believe that the success of our “educators first” philosophy depends on the extent to which the message to our clients is clear, relevant and helps in the process of making sound decisions for their future.

As the Chinese philosopher Confucius said:

“I hear and I forget. I see and I remember. I do and I understand.”

Again, it is important to note that a big part of the success of this self-service model is your feedback, so please let us know your thoughts and we will be reaching out on a proactive basis as the platform evolves.

It has been such a wonderful experience learning about you and your families over the past two years. I look forward to working with each of you and thank you for always being so gracious in each of our interactions as we truly value each individual relationship.

Please do not hesitate to contact us at 412-823-4704 if you have any questions or would like to schedule a review.

I wish you and your families continued health and prosperity in the remaining months of 2016.

Sincerely,

Alison

To read May's Monthly Vantage Point, please click the following: Monthly Vantage Point May 2016.