TRUST

TRUST is a leading edge solution helping planners leverage their time to manage workflow and resources in a truly effective way.

"We're delighted to introduce TRUST to drive new business and expand your service offerings to existing clients. TRUST comes complete with customised marketing, support and reporting collateral. Financial planning firms can host the solution from their website, creating a unique point of differentiation in your firm and your marketplace.**"** *Colin Dunn, Principal, ReNew Group Pty Ltd*

renew group

What is TRUST?

ReNew Group's flagship professional selling tool for financial planners, TRUST, is a web-based solution that enables advisers to understand precisely what clients want. Clients identify their needs by completing online assessments that you assign to them. The responses to the assessments allow TRUST to generate a client service plan to help you plan your workflow for key clients and avoid team burnout and job blow up. The client service plan also identifies potential risks and opportunities with which you may want to help your clients.

TRUST provides a client-centric methodology for identifying both compliance and non-compliance needs. We base our methodology around a proven selling system. As a result, our financial planning clients sell more services, better service their clients, generate more profits and create sustainable value.

How to seamlessly integrate TRUST into your firm

1. Review your client list and decide which clients you need to give priority and better manage.
2. Create TRUST assessments based on ReNew Group's pre-designed templates
3. Using the positioning collateral that comes with TRUST, carefully select key clients and advise of the process you will invite them to go through.
4. TRUST's email tracking and reminder system then swings into action; your clients are invited to work through an online assessment at their convenience and independent of you.
5. Upon completion of each client's assessment, you immediately receive an email advising you to download their TRUST assessment report.
6. The TRUST assessment report documents your client's responses to the questions and lists any action points that they feel should be addressed.
7. You now have an invaluable process to help you plan workflow and identify opportunities – initially without having to invest any time face to face with the client to gather that information.
8. Result: significant time savings for your firm and your clients, happy staff, secure clients and opportunities to follow up as required by your clients.

Find us at www.renewgroup.com.au

Request a trial assessment and sample report by calling TRUST Support on 0400 335 462 or email wendy.gleeson@renewgroup.com.au.