

# Client Advisory Board Roles and Responsibilities

## About the Client Advisory Board

The Client Advisory Board is comprised of a select group of clients who help us gain insight into our clients' wants and needs, thereby providing valuable feedback on:

- ❖ Financial planning, client tools, and investment services
- ❖ Customer service initiatives and office atmosphere
- ❖ Business, marketing, public relations, and event planning.

## Mission Statement

The Client Advisory Board acts as a delegate in representing the broad scope of clients' interests, providing growth and learning opportunities for Hathaway Financial Group and their current client base through new and established programs, interactions and connections. Furthermore, the board evaluates, participates in the development of, and promotes new programs and techniques to attract new clientele. The Board also further identifies the wants and needs of the business relationship and prioritizes what should be done to strengthen its common interests and high level of performance.

## Past Achievements and Future Goals

The board has worked closely with our team on projects such as literature for prospective clients, a charity-based referral incentive program, and a highly customized, interactive website. Future collaborative efforts will continue to focus on tools, technology, communication, and services that will enhance the client experience.

## Why Join

By providing feedback via our advisory board, you can have a direct and lasting impact.

- ❖ You have a voice in how we run our practice, and consequently a direct positive effect in your individual relationship with us.
- ❖ Your opinions can help us improve the quality of our services to other clients in the practice, as well as services we offer to the community at large.
- ❖ Your insight and experience can help us meet new clients like you, which is instrumental to our success and aids us in maintaining the personal and genuine service everyone deserves.

## Board Member Roles

Our board members represent the most important part of our organization – our clients. They act as centers of influence, referral generators, and all-around knowledgeable spokespeople for who we are and what we do to help others. Participation in all our marketing and outreach efforts, including educational, community and social events, is always welcome and strongly encouraged.

## **Board Member Responsibilities**

- ❖ 3-4 meetings per year [currently 1<sup>st</sup> Wednesday evening in March, June, and October].
- ❖ Homework and projects in between full board meetings, with active participation in discussions [via email, phone, live meetings, etc.] as needed.
- ❖ Participation and support at Hathaway Financial Group events.