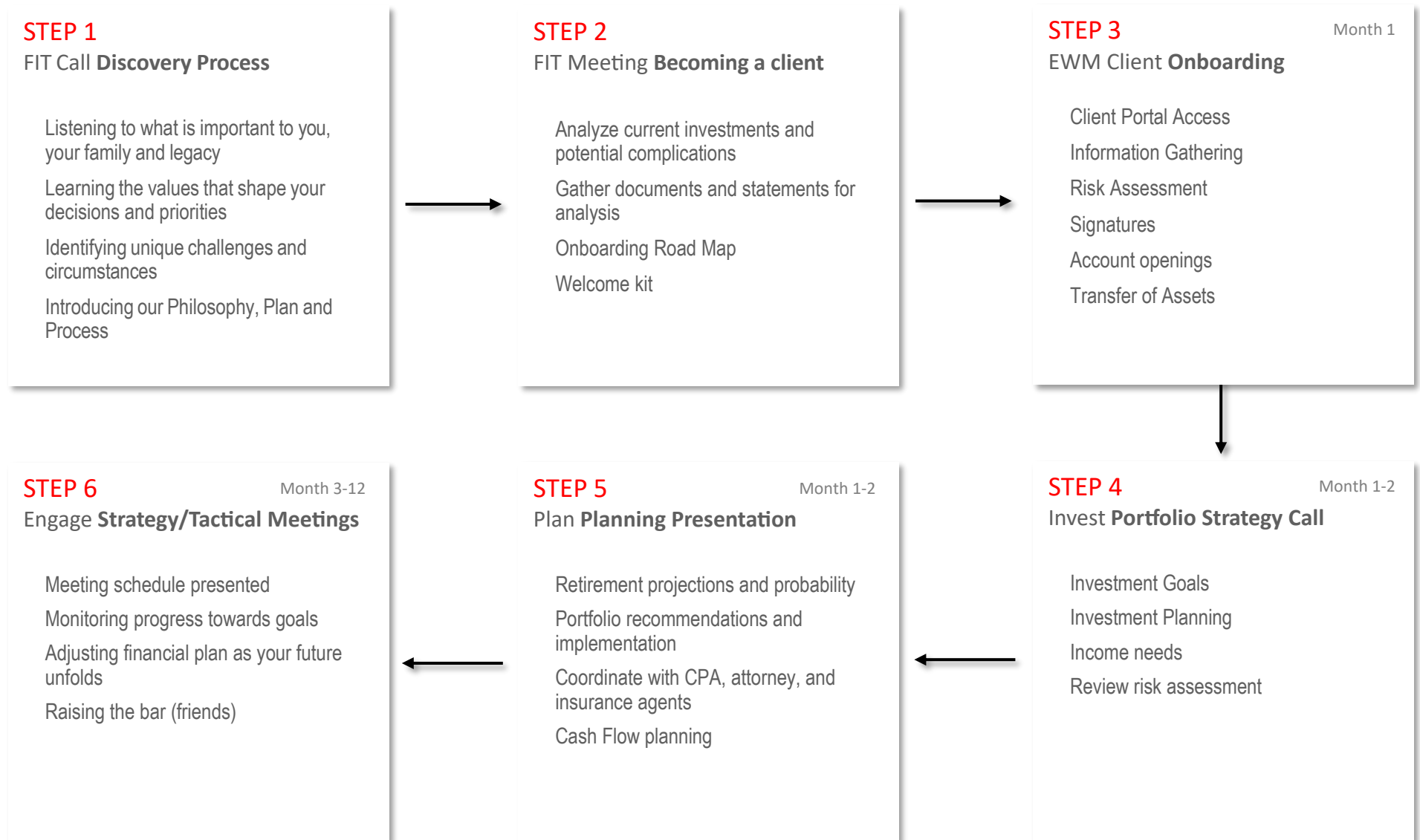


# Client Experience – Onboarding Road Map



# Client Experience – Engaging with EWM

## IN TOUCH



### Monday Minute

Follow along on social media



### The Live Wire

Videos sent to your inbox



### Route 39 Market Beat

Watch us on YouTube



### Clearly Connected Newsletter

Available digitally or in print

## Proactive Contacts



### Strategy Review

Update your Financial Plan



### Tactical Analysis

Review your portfolio allocations



### Engagement Update

Update your personal information



### Team Communication

Emails, phone calls, and videos

Information relevant to  
your plan

Quickly locate  
helpful resources



Easily follow current  
stock holdings

Conveniently read expert  
advice

