

JYC与客户的典型财富管理策略路线图  
 JYC's typical Wealth Management (WM) Strategies Roadmap with clients

了解  
Discover

面谈会议了解客户需求  
Face-To-Face Client Discovery Meeting



创造  
Create

开户 Open account	
制定投资政策声明 Determine Investment Policy Statement 提出投资组合建议 Present investment proposal	制定财富管理服务表 Determine Advice & Service Scorecard 制定财富规划路线图 Determine Wealth Planning Roadmap



建立  
Build

进行投资 Invest accordingly	如有需要会见合适的TD规划专家 Meet with suitable TD specialists, if needed 提出并实施财富管理策略 Present and implement WM strategies
----------------------------	---



审查  
Review

定期电话会议审查  
Regular phone call review  
年度客户面谈会议  
Face-To-Face Annual Client Meeting



管理  
Manage

由于重大事件或根本性变化  
管理和重新平衡投资组合  
Manage and rebalance investment portfolio due to major events or fundamental changes



管理财富规划路线图  
并定期审查财富管理服务表  
Manage WM Roadmap and continuous review of client's Advice & Service Scorecard



**JYC與客戶的典型財富管理策略路線圖**  
**JYC's typical Wealth Management (WM) Strategies Roadmap with clients**

了解  
Discover

面談會議了解客戶需求  
Face-To-Face Client Discovery Meeting

創造  
Create

制定投資政策聲明 Determine Investment Policy Statement 提出投資組合建議 Present investment proposal	開戶   Open account 制定財富管理服務表 Determine Advice & Service Scorecard 制定財富規劃路線圖 Determine Wealth Planning Roadmap
--	--

建立  
Build

進行投資 Invest accordingly	如有需要會見合適的TD規劃專家 Meet with suitable TD specialists, if needed 提出並實施財富管理策略 Present and implement WM strategies
----------------------------	---

審查  
Review

定期電話會議審查  
Regular phone call review  
年度客戶面談會議  
Face-To-Face Annual Client Meeting

管理

由於重大事件或根本性變化 管理和重新平衡投資組合 Manage and rebalance investment portfolio due to major events or fundamental changes	管理財富規劃路線圖 並定期審查財富管理服務表 Manage WM Roadmap and continuous review of client's Advice & Service Scorecard
---	---

