

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 (

制定投资政策声明
Determine Investment Policy Statement
提出投资组合建议

Present investment proposal

开户 Open account 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





审査 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





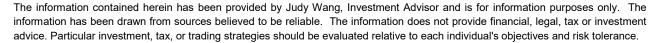
管理 Manage 由于重大事件或根本性变化管理和重新平衡投资组合

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

開戶

戶 Open account

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



制定投資政策聲明

Determine Investment Policy Statement

提出投資組合建議

Present investment proposal



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





審査 Review

定期電話會議審査

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

