

# The Value of Partnering With Zoe

## **E-Sign Experience:**

Win clients faster with a streamlined experience.

## **Financial Plan Deliverable:**

Automate your follow up with a turnkey one-page plan.

## **Real-Time Client Feedback:**

Improve your service continuously.



## **Contact Us**

[advisorsupport@zoefin.com](mailto:advisorsupport@zoefin.com)

872-206-9674

[zoefin.com/join-as-an-advisor/](https://zoefin.com/join-as-an-advisor/)

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## **Pipeline:**

- Manage opportunities.
- Identify bottle necks.
- Improve conversion overtime.

## **Insights:**

Drive better results through data.  
Apply learnings even to business  
outside Zoe.



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**Account Manager** dedicated to helping you improve your practice.

## **1-1 Business Coaching**

- Identify your gaps & strengths.
- Streamline your business development process.
- Refine your pricing to stay competitive in your local market.



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## **Client Resources**

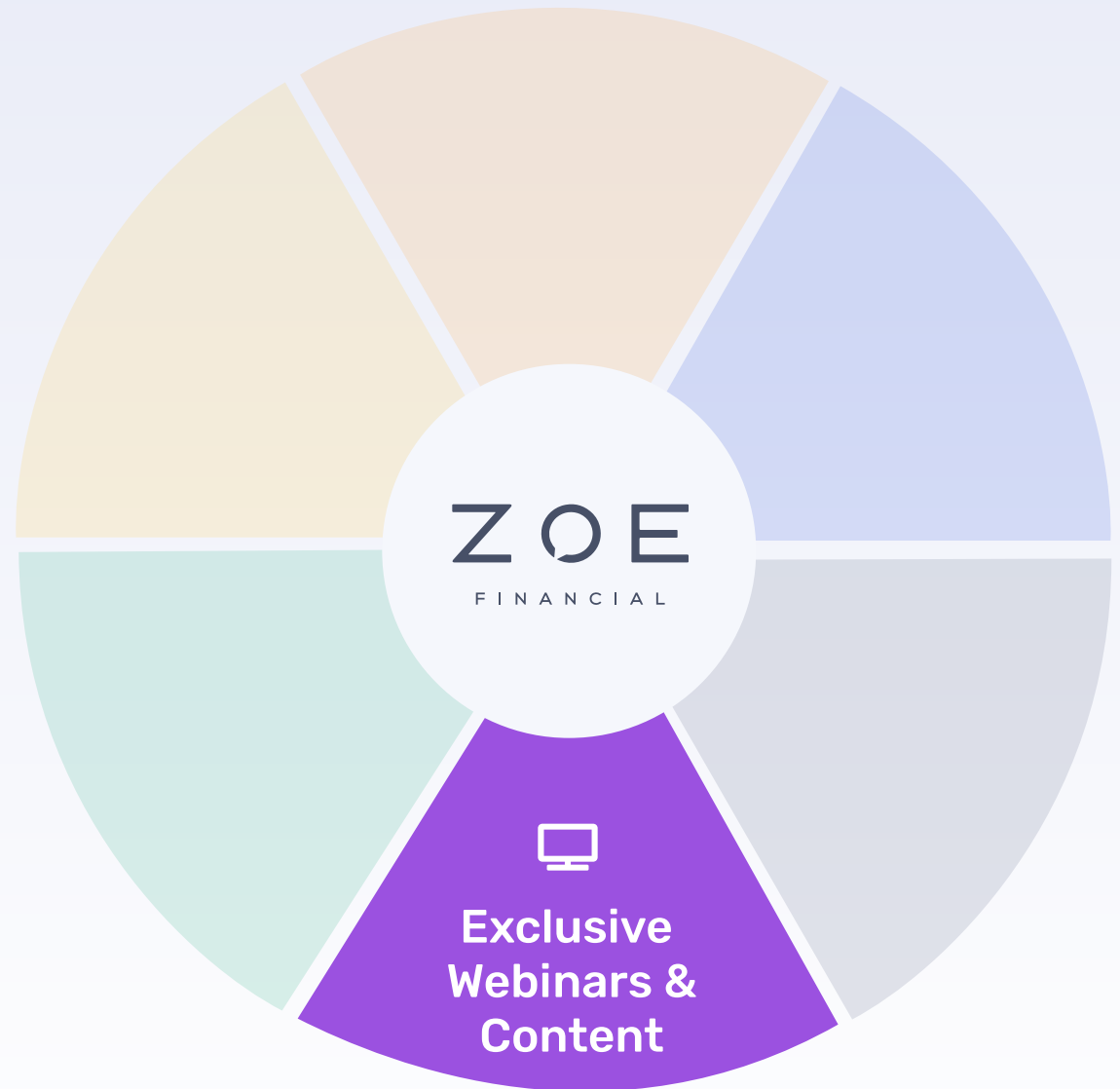
Recommendations to share with your clients & prospects.

## **Webinars & Articles:**

Access to industry titans' insights. Curated content to stay up-to-date with industry trends.

## **Educational Courses**

Hone your advice and business development skills



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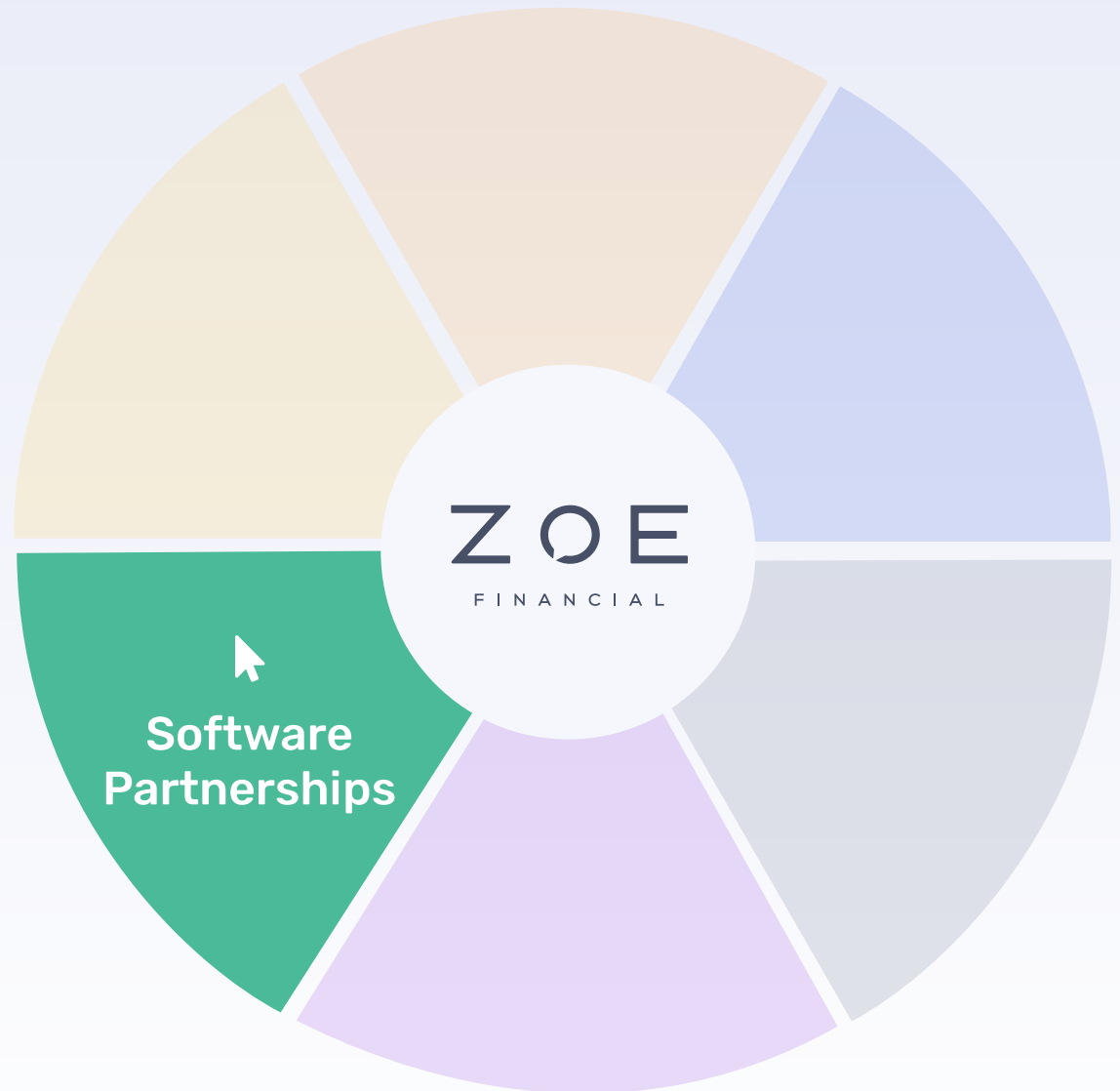
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# The Value of Partnering With Zoe

**Exclusive access to offers**  
from our software partners in  
the industry.

Including, but not limited to

- Betterment for Advisors
- Wealthbox
- Right Capital



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# The Value of Partnering With Zoe

**Pre-qualified** potential clients to match your preferences.

**Scheduled directly** on your calendar.

**Business Development team** dedicated to pipeline follow up to save you time and advocate for you.

**Marketing & Press Support**



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