ASSET-MAP
TRAINING
CHECKLIST

☐ ### Register/Complete your Smart-Start ↗

- Foundational training - Hosted live 2x per day, M-W-F

☐ ### Register/CompleteTarget-Map Training ↗

- Target-Map training - Hosted live 2PM EST every Thursday.

☐ ### Schedule additional 1:1 Training ↗

- (Optional) Fill in the gaps - Meet with Onboarding Advisor on your schedule

For additional support :
support@asset-map.com

ADVICE STARTS HERE

Asset-Map

Onboarding Checklist

GETTING STARTED

- [ ] Complete your Smart Start
- [ ] Upload Photo/ Customize Settings
- [ ] View Learn AM in 30 minutes
- [ ] Download Marketing Kit

ASSET-MAP WITH CLIENTS

- [ ] Add 5 Clients' Households
- [ ] Apply a stencil/ Create your own
- [ ] Generate a comprehensive report
- [ ] Share the Asset-map with One client in a meeting

ASSET-MAP FUNDING

- [ ] Complete Target-Map training
- [ ] Set Target-Map preferences
- [ ] Build two Target-Maps
- [ ] Share a comprehensive report in a meeting

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ADVICE STARTS HERE

Helpful Key words to search for within the support center

- [ ] Household
- [ ] Discovery
- [ ] Integrations
- [ ] Stencils
- [ ] Target-Map
- [ ] Senerios
- [ ] Contact
- [ ] Settings
- [ ] Copy
- [ ] Asset

- [ ] Entity
- [ ] Glossary
- [ ] Contents
- [ ] 30 minutes
- [ ] Funding
- [ ] Preferances
- [ ] Contributions
- [ ] Estate
- [ ] Net worth
- [ ] Key

- [ ] Dashboard
- [ ] Liability
- [ ] Fire Drills
- [ ] Add
- [ ] Delete
- [ ] Report
- [ ] Marketing
- [ ] Layout
- [ ] Hide
- [ ] Webinar

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