Integrating HALO into your workflow;
with existing clients.

Below is a step-by-step guide for integrating HALO into your workflow with existing clients.

1. Send an invitation via email to the client inviting them to take the HALO assessment.	2.Client follows link and completes the HALO assessment (under 2 minutes completion time)	3. Receive an email from Genivity with the client's contact information and 8-page HALO report.	4. Review the client's full, 8-p age HALO report.	5. Contact the client via email or phone to schedule a follow-up appointment.
6. Review the client's current financial standing, and prepare any financial product recommendations and savings strategies.	7. Prepare for the client meeting.	8. Print out 2 copies of the client's HALO report. One to give to the client and one for your client documentation folder.	9. Print out Genivity-provided client education materials to accompany their HALO report.	10. Print out the product recommendation information
11. Review the conversation cards for tips on having health-related financial decision making.	12. Conduct client meetings and suggest sharing HALO with their significant other, aging parents and siblings or any other family member they feel would benefit.	13. Incorporate Genivity-prepared marketing materials in your email newsletter campaigns & social media posts to keep your audience continually aware of topics concerning health, family and finance.	14. Participate in monthly webinars on HALO updates	15. Incorporate an invitation to take the HALO assessment when you schedule annual reviews with your client base. Recommend clients take HALO annually because results change based on the clients' behavioural changes.

Integrating HALO into your workflow;
with <u>prospects and new</u> clients.

Below is a step-by-step guide for integrating HALO into your workflow to prospect for new clients.

1. Incorporate Genivity-prepared marketing materials in your normal email newsletter campaigns and social media posts to keep your audience continually aware of topics concerning health, family and finance.	2. Use Genivity-prepared materials to post on your social media, blog and email platforms inviting people to take HALO.	3. Use Genivity- prepared downloadable materials to print and use in physical mail campaigns and flyers, brochure, postcard placement in local places of business promoting your advising practice.	4. Review Genivity- prepared Lunch and Learn presentation marketing kits for presenting a range of topics from planning for health care costs, planning for a high-quality retirement lifestyle, understanding hereditary disease risks and how to include multiple family members in making health decisions.	5. Participate in Genivity continuing education and training opportunities or talking to prospective clients about health-related topics.
6. Incorporate an invitation to take the HALO Assessment when you schedule annual reviews with your client base. Recommend clients take HALO annually because results change based on the client's behavioural changes.	7. Prepare for the client meeting	8. Print out 2 copies of the client's HALO report. One to give to the client and one for your client documentation folder.	9. Print out Genivity-provided client education materials to accompany their HALO report .	10. Print out the product recommendation information