INSMARK TRAINING SERIES

CLIENT DATA QUESTIONNAIRE (CDQ)

INTEGRATED WITH WEALTHY AND WISE+

Host: Julie Nayeri, Sales Manager & Lead Trainer

A CDQ Sample Walk-through

- How does the advisor email the data form to the client
- The client’s experience with filling out the data form and submitting it
- How does the advisor review and refine the data
- How does the advisor check for the preliminary result
- How does the advisor export the CDQ data into WAW+

TIPS FOR CDQ DATA INPUT

Use adjusted gross income (AGI) as the income on CDQ (with qualified expenses such as 401(k) contributions subtracted).

When CDQ data is exported into Wealthy and Wise+, the reports will show the incomes as net amount automatically.

The inflation rate is applied to expenses as well as earned incomes and 401(k) contributions.

The retirement plan assets use the overall rate of return as the yield assumption.

Click on the Close button to save and exit each client case.

InsMark Customer Support

- InsMark provides live customer support during business hours.

  Phone support: 925 543-0507

  Email support: support@insmark.com

- If you need help with the email setup in CDQ, watch the 10-minute "Getting Started" video or contact InsMark Support. You only need to do the setup once in CDQ.