



Katy Oakley <katy@smallwavemarketing.com>

Contract Generation Doc - for FPA Business Hub Portal



Morgan Sears <morgan@rooksdm.com>

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To: Katy Oakley <katy@smallwavemarketing.com>, Aleksandra Weil <aleksandra@rooksdm.com>

Hey ladies!

A few edit suggestions from me for the edited piece of "Contract Generation" content:

- Overall
 - We have the RooksDM logo sometimes in the top left of each page, sometimes in the top right and sometimes just the logo (no RooksDM)....should we make this consistent or is it mainly depending on where the text is?
- Page 2
 - Are you a financial advisor struggling with a time-consuming **agreement generation process**?
 - is this standard to say agreement generation process? Just trying not to repeat contract again?
 - Do we need to the "Introduction" listed?
 - May flow better and look sleeker if we take it out....thoughts?
 - Automating contract generation processes can significantly enhance productivity and **improve client experiences**.
 - Would it sound better to say...."improve the client experience" at the end?
- Page 3
 - spacing looks different on some of the bullet points in this one...is it just that normal stuff that happens sometimes?
 - i.e. # 2 – 2nd bullet point - Enable two-way synchronization between the CRM and the e-signature platform to keep data consistent and up-to-date.
 - **7. Ensure Security and Compliance:**
 - Review the security measures and compliance standards of the chosen e-signature platform **to protect sensitive client data**.
 - Should we change this to say "to guarantee that sensitive client data is protected".
- Page 4
 - By embracing these technological advancements, **financial advisors** can stay ahead of the curve, deliver exceptional services, and drive sustainable growth in a digital era.
 - Should this be financial advisory firms or is this ok?
 - The social/contact banner is only at the bottom of this page
 - Do we want it on all of them or none of them?
 - For consistency, we didn't include them on any page of "Ultimate Guide for FAs" Doc.
- Page 5
 - We do this through consulting, implementation, and **maintenance**. We have experience with customizing and automating a variety of technology solutions including Microsoft Office 365 as well as connecting with other applications using API's.
 - Need to change maintenance to support
 - Actually need to make this change on the  [The Ultimate Guide to Streamline Your Intake Process.pdf](#) too
- Page 7
 - For a free **30-minute consultation**, contact us.
 - Should we take the 30-min portion out based on our new qualifying system?
 - IF yes, need to make that change in  [The Ultimate Guide to Streamline Your Intake Process.pdf](#) too



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