zocks

QUICK-START CARD

LPL VIP PROGRAM | WEEK 4 | NOV 17

Planning Tools, Roles and 30-Day Check

Plan, tax and estate data in every brief, and plans that keep up with every conversation.

Why Week 4 matters

Connect the planning tools you already use, and Zocks brings plan, tax and estate data into Meeting Prep, then suggests plan updates from each meeting for your review. This week also confirms who owns each step, now that your team has run real meetings.

Built for advisors and the Planning Updates owner, often ops.

Advisor and ops this week

Advisor
Connect your planning tools and confirm every role.

Ops
As the Planning Updates owner, review and approve suggested plan updates.

Confirm and expand your roles

Confirm the owners from Week 1, then name the new ones:

Meeting Prep — Confirm
Name

Follow-Through — Confirm
Name

Planning Updates — New
Reviews Zocks' suggested plan updates and approves what gets saved.
Name

Forms and Hand-Offs — New
Owns form-based hand-offs (Weeks 5 and 7).
Name

Your 30-day self-check

Check each item off by day 30:

- [ ] Core 3 connected
- [ ] One meeting pushed to the CRM
- [ ] A planning tool connected
- [ ] One plan update saved from a meeting
- [ ] Roles confirmed

Connect the planning tools you use

1. **eMoney (WealthVision)**
   Settings, Integrations, Financial Planning, Connect next to eMoney. WealthVision is LPL's version of eMoney, so use the eMoney option.
   Help Center: eMoney guide
2. **RightCapital**
   Same path, Connect next to RightCapital. Syncs reviewed meeting details to 200+ fields and creates contacts for new prospects.
   Help Center: RightCapital guide
3. **Holistiplan**
   Settings, Integrations, Tax Planning. Brings tax return data and analysis into Meeting Prep and Ask Anything.
   Help Center: Holistiplan guide
4. **Wealth.com**
   Settings, Integrations, Estate Planning, then turn on Contact Synchronization. Brings estate plan status and documents on file into prep.
   Help Center: Wealth.com guide

TIP **Connect what you use. Most practices need one financial planning tool, plus tax and estate as applicable.**

Plan, tax and estate in every brief

- eMoney: default Meeting Prep templates already include financial planning data. Custom templates need a planning section.
- Holistiplan: ask tax questions mid-meeting through Ask Anything.
- Wealth.com: estate data feeds Meeting Prep, live meetings and Ask Anything. It doesn't push data back yet.

Review plan updates

- After each meeting, Zocks shows suggested updates beside current values, section by section.
- Only the sections you leave checked are saved.
- Sign in to eMoney through SSO? Log in to eMoney first, then click Connect.

Wealth.com needs one more step
Add an estate planning section to your Meeting Prep template. Default templates don't include one. Week 6 covers templates.

→ **Next week: how meeting types, prep, templates and forms fit together.**