

How to Handle Client Death

Explanation: Not only is it the responsibility of the advisor to show empathy and concern for a client death in the moment. It is also important to keep that sensitivity consistent through your remaining lifetime with the living beneficiary.

Statistic: More than 70% of widows leave their advisor after a death because they don't feel included.

CRM Tools used:

Date of Death Field
Family/Memberships
Family Name Field
Status
Notes

Directions and Click Map:

- 1 Create a 'Deceased' Status within the database.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > STATUSES](#)
- 2 After a client passes away, fill out the Date of Death field on the client's contact record. [CONTACT RECORD > CONTACT DETAILS > EDIT > DATE OF DEATH](#)
- 3 Change the client's Status from 'Active' to 'Deceased'.
[CONTACT RECORD > CONTACT DETAILS > EDIT > STATUS](#)
- 4 If the client was the head of household within the Family, change the spouse to the new head of household.
[FAMILY NAME > SETTINGS WHEEL > CHANGE HEAD](#)
- 5 Adjust the Family Name to reflect the new household arrangement.
[FAMILY NAME > SETTINGS WHEEL > EDIT](#)
- 6 Move the deceased client from Family to Memberships. This will allow for the relationship to be tracked without infringing on the tax definition of family. [MEMBERSHIPS > ADD > LINKED CONTACT](#)
- 7 Remove the Client Review Date on the deceased clients record. If the client's spouse is an active client as well, move date over to new head of household.
[KNOW YOUR CLIENT > CLIENT REVIEW > EDIT](#)
- 8 Add a Note to the deceased contact record of all changes.
- 9 Complete or delete any future or repeating activities.

Why Do We Do This? During a time of mourning, being sympathetic is paramount to good service. By updating the contact record with information about the clients passing, you ensure that your future communications will be sincere to their loss.

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|---------------------------------------|---|
| Marital Status Married | Marital Anniversary <input type="text"/> |
| Client Since 05/23/2013 | Client Termination Date <input type="text"/> |
| Date of Death <input type="text"/> | |

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|---------------------------|
| Status Deceased |
|---------------------------|

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|--|
| Edit Add Member Change Head Delete Family |
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|---|--|
| ADD MEMBERSHIP | |
| Linked Contact <input type="text"/> | |
| Linked Contact Is Please select | |
| Contact Is Please select | |
| <input type="button" value="cancel"/> <input type="button" value="add membership"/> | |

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|--|------------------------------------|
| CLIENT REVIEW | |
| First Review Date 09/14/2017 | |
| Repeats monthly | Repeats every X months 6 |
| Repeats monthly | Each |