

TOOL 2.1.3: Exploratory meeting confirmation letter | Making contact

PURPOSE: This is a client communication template to confirm the client's agreement to participate in an exploratory meeting to discuss their current circumstances and advice needs. To be sent within 24 hours of the initial telephone enquiry.

**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

.....
Dear <client name>,

It was great talking to you today and learning a little about what you are looking for.

We believe that the best results are only achieved if they are based on a strong relationship and a deep understanding of each other. Therefore, in order for us to potentially work together and help you achieve what's important, we need get to know each other a little more.

As discussed, we are pleased to confirm our exploratory meeting on <date/time>.

This meeting will be held at our office where will get a better understanding of your situation and what you are looking to achieve. It will also provide you with an opportunity to get to know us and explore how we could help you make it happen.

Please allow 1 hour and 15 minutes for this meeting.

To get the most from our time together, please find enclosed the exploratory meeting information pack including:

- Exploratory meeting preparation guide
- Things to think about before we meet
- Meeting agenda
- Brief overview of our business
- Travel guide to our office
- Brief introduction to our team

You have advised us that <accomplice name and relationship> will be accompanying you at this meeting.

Participating in our discussion with you will be <consultant's name>, your Senior Financial Consultant and <adviser's name>, your Associate Adviser.

2 EXPLORE

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At the conclusion of our discussion, we will advise you of the next steps required to help you address your personal and financial needs, now and in the future. Please contact us if you have any queries prior to our meeting.

We greatly appreciate the opportunity to assist you in your successful financial future and look forward to meeting you.

<Sign off>