

TOOL 2.2.4: Client focused business introduction | Exploratory meeting client information pack

PURPOSE: A brief introduction to market your business to the potential client included in the 'exploratory meeting client information pack'.

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

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A BRIEF INTRODUCTION

OUR PROMISE - TO YOU

Our promise is that working together is all about you and helping you put in place a plan for a better life. Achieving this is central to everything we do. If we do not believe we can deliver this promise, we will not proceed to work together and will advise you of a more suitable alternative.

OUR CORE VALUE - ACHIEVING YOUR GOALS

The value we deliver is working together to help you get results that may be more difficult to realise if you did it yourself. We are committed to helping you achieve the things that are important to you, and sustaining them. We promise to always act in your best interests and to treat you and your money as if it was our own.

OUR SERVICES - HOW WE CAN SERVE YOU

Central to our service is providing advice suited to your individual needs. We will ensure you understand our advice, why it is appropriate and how it will contribute to your success. We will regularly discuss your progress and ensure you always remain on track.

OUR CLIENTS - WHO WE CAN SERVE

We specialise in working with people just like you. We have built our business around understanding the specific challenges and advice needs you may have.

As a result, our advice specialists and client management teams know exactly what needs to be done and how to do it exceptionally well.

We only work with people who are committed to working towards their goals and are prepared to achieve this on an ongoing basis.

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OUR TEAM - DEDICATED TO YOU

You will have full access to our team of keen enthusiastic specialists whose sole purpose is to achieve results that mean something to you. A brief introduction to our people is included in this pack.

OUR HISTORY- WHY WE DO IT

We understand firsthand how challenging it is to manage the competing priorities in our busy lives. The ability to help you overcome these challenges, improve your financial wellbeing and enable you to enjoy the rewards of all your hard work is the reason we are in business!

Success for us is when we put you in a better position than you could achieve on your own.