

TOOL 2.2.6: Team intro sheet | Exploratory meeting client information pack

PURPOSE: Client communication introducing the team of dedicated people who form part of the business. This is to be 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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THE TEAM OF PEOPLE DEDICATED TO YOU

Embarking on a journey to a better life is a big step. Knowing there is a team of people dedicated to supporting you along the way can make all the difference.

Our people are our lifeblood. They are all highly qualified and have the relevant industry specialisation and expertise required to help you get results. However, in addition to their amazing credentials, they realise that our business is based on building long-term, deep relationships. They make it their mission to genuinely get to know you, understand your challenges and be available to support you no matter what life dishes up.

The real success in any work we do together is based on us getting to know each other. As a starting point, here is a brief introduction to the people who will be proud to be on your team.

Hi, I am <name>:

I am the principal adviser in our business.

<Include your brief introduction and a photo. You can make it as formal or informal as you see appropriate. Remember to keep it real and personable. Provide some insight that people will enjoy and make them excited about meeting you.>



(Add a professional photo so people can see you are real.)

(Include an introduction for each team member. If you have a large team, you may only wish to include those who will be working with each client.)