

TOOL 2.3.11: Confirmation letter of agreement to proceed to the discover stage |
Exploratory meeting business information pack

PURPOSE: Client communication confirming the potential client's agreement to proceed to the discovery stage and participate in the discovery meeting. To be sent within 24 hours of the exploratory meeting.

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

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Dear<first name>,

RE: The next exciting stage in your journey – the discovery phase

We enjoyed meeting with you today and gaining an initial understanding of what's important in your life, the advice you are seeking and how we may help make it happen.

As explained, the next step is to explore in greater detail your current situation and exactly where you would like to be positioned in the future. We will also explain what happens next and outline what our relationship would look like moving forward.

We agreed to meet again at our offices on <date/time>. You should allow <two> hours for this meeting.

To use our time wisely, please find attached your discovery meeting information pack, including;

- o Discovery meeting preparation guide
- o What to think about
- o Agenda for discovery meeting
- o Travel guide <only include if this is the first time to the office>

Participating in our discussion with you will be <name> your senior financial adviser, <name> your associate adviser and myself.

We greatly appreciate the opportunity for further discussion with you and look forward to the prospect of working together and helping make a difference in your life.

If you have any questions prior to our meeting, please let us know.

<Sign off>