

TOOL 2.3.4: What's important to the client information capture form | Exploratory meeting business information pack

PURPOSE: A data collection form to be used by team members engaged in the exploratory meeting with the potential client to record the details of what is important in their lives today and in the future. The questions need to be relevant to your specific clients. This can be used as an alternative to or in conjunction with your own data collection form to collect additional client information.

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

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WHAT'S IMPORTANT INFORMATION FORM

Name:

Date:

General

What is really important to you;

a) In your life today

b) In your life in the future

Family

What would you like to do to support your children or parents over the next 10 years?

EXPLORE

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Lifestyle

What does your ideal lifestyle look like over the next 10 years?

Assets

How important is home ownership to you?

What does your dream home look like over the next 10 years?

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How important are things like cars, boats, holidays or a holiday house?

Career/business

What are your career/professional aspirations?

Would you like to own your own business at some time in the future?

Retirement

What is your ideal lifestyle in your retirement years?

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What would you like to do to support your children in your retirement years?

What is your dream home in retirement years?

Further information that's really important