

TOOL 2.3.9: Agreement to proceed to the discover stage | Exploratory meeting business information pack

PURPOSE: Agreement to be used by the personal client manager at the conclusion of the exploratory meeting for the client to proceed to the discovery meeting.

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

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AGREEMENT TO PROCEED TO THE DISCOVER STAGE

AGREEMENT

I/We agree to proceed to the next step, and participate in the discovery meeting with <business name>. The objectives of this meeting and the associated fees have been explained and I/we understand that this step is crucial to ensure any advice that is prepared is specific to my/our circumstances and addresses my/our needs.

Name:

Signature:

Date:

Name:

Signature:

Date: