

**TOOL 5.1.2:** Letter confirming completion of advice implementation | Advice implementation

**PURPOSE:** Client communication confirming the completion of the implementation of advice to the client. To be sent within 24 hours of confirmation of the implementation of the final outstanding component of advice.

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

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Dear<first name>,

RE: Your advice is in place and you are on your way to a prosperous future

<We are so happy you were able to join us at the cricket last month. I hope you enjoyed the day.>

We are excited to inform you that all your recommendations have now been fully actioned. This means you are one step closer to <making a difference and realising your dreams >.

Please find below the final outcome of all advice components (add specific details>:

1. <Your XYZ Superannuation Account, JKL Superannuation Account and PHQ Superannuation Account have all been closed.
2. The total balance of these accounts, \$347,987, has been deposited into the newly created ABC Pension Account managed by ABC Funds Management. You now have on-line access to all new account information and reports and I have been advised that the receipt of your personal PIN and password has been received.
3. Your FGH shares have been sold and the funds deposited into your BYO account.
4. Your DSV Investment Balanced Fund has been closed and the final balance of this account of \$234,890 has been deposited into the newly opened ABC Investment Account. The same PIN and password for your ABC Pension Account will provide access to all Investment Account details.
5. Your new home loan account with LTD Bank has been opened and your previous loan with NMO Credit Union settled. The early loan repayment fee due to NMO Credit Union was reduced to \$350 and paid.
6. All applications for your life and income protection insurance have been accepted and you should have now received all policy documentation directly from QFJ Insurance.>

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Our next meeting will be in <October> where it is important we meet to discuss any changes in your circumstances and make any refinements required to your advice. We will also undergo an initial review of your progress and update you on how you are tracking to achieving the results you are working towards.

In the meantime, we will keep you updated on any issues that may impact your situation and will let you know if we identify any opportunities you may wish to take advantage of.

As always, please get in touch if you have any questions or concerns.

Here's to your future!

<Sign off>