TOOL 6.1.2: Request form to update personal/financial information | Progress review meeting client information pack

PURPOSE: This is a client communication template to confirm the client's agreement to participate in an exploratory meeting to discuss their current circumstances and advice needs. To be sent within 24 hours of the initial telephone enquiry.

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

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MAKING SURE YOUR PERSONAL/FINANCIAL INFORMATION IS UP TO DATE

UPDATE YOUR DETAILS

Please detail any changes occurring in your circumstances in the last <six> months or anything that is frustrating you and needs attention when it comes to managing your financial affairs.

Family:

Health:

Business/work/professional:

Aspirations and what's important to you:

Anything else we should know: