

TOOL 6.1.3: Progress review meeting client preparation guide | Progress review meeting client information pack

PURPOSE: Client preparation guide to help the client prepare for discussion in the progress review meeting. To be forwarded with the progress review client information pack 21 days prior to the meeting.

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

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PROGRESS REVIEW MEETING PREPARATION GUIDE

THE OBJECTIVES OF OUR PROGRESS REVIEW MEETING:

1. To review any change in your personal and financial circumstances and how these may impact the advice currently in place.
2. To discuss and review your progress and make any necessary changes.
3. To outline any changes in legislation, economic, political or market conditions that may impact your situation.
4. To provide you with the opportunity to raise any questions or concerns.

HOW SHOULD I BEST PREPARE FOR THIS DISCUSSION?

Review the completed request form to update your personal/financial information, and think about any other changes in your personal and financial circumstances that we need to know

Think about anything that may have changed in your world since we last met

Review the most recent statement of advice to ensure you are familiar with the advice currently in place; and

Think about any questions or concerns you may have and would like to discuss.

WHAT INFORMATION AND DOCUMENTATION SHOULD I BRING?

- Statements and current balance of any new bank accounts opened in the last six months
- Statements and current balance of any new investment accounts opened in the last six months
- Most recent business financial statements
- Your most recent housing loan statements and current balance of all loan accounts

6 DEMONSTRATE

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- Details of your current personal spending
- Statements and current balance of any new credit card accounts opened in the last six months
- Current valuation of all assets, eg. Home, car, home & contents, jewellery, etc.
- Details of your salary and any work entitlements

HOW MUCH TIME SHOULD I ALLOW?

Please allow <1.5> hours. We may not need all that time, however it is best to allow for it.

HOW MUCH IS THIS MEETING GOING TO COST?

The progress review meeting is included in the ongoing relationship fees already outlined and agreed to. There is no additional cost to you.

Please contact us if you have any queries or require further information prior to our next meeting. We look forward to seeing you again soon.

<Sign off>