COMMERCIAL FINANCE LAUNCH PROGRAMME · NAIL COMMISSION DISCLOSURE

Commission disclosure placement checklist

Every place disclosure must appear (financial promotions, Terms of Business, recommendation, website, portal), each with a wording-source field. It does not supply the wording.

01 Where disclosure must appear

For each touchpoint, confirm disclosure is present and record where its wording came from. This checklist does not supply the wording.

Financial promotions: disclosure present? Wording source?

Terms of Business: disclosure present? Wording source?

Recommendation to the client: disclosure present? Wording source?

Website: disclosure present? Wording source?

Client portal: disclosure present? Wording source?

02 Your wording source

The wording is not yours to draft; name who owns it.

Who supplied your approved wording: your network, your compliance function, or the NACFB templates?

03 Prominence check

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Talk to us

Confirm the disclosure is prominent, not buried, at each touchpoint above.

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