FINANCIAL ADVISORY LAUNCH PROGRAMME · DECIDE WHAT ADVICE YOU'LL GIVE

# Scope of advice worksheet

Turn "what I want to do" into the permissions, qualifications and insurance each area triggers.

## 01 The advice you will give

For each area, note whether you are in or out at launch, and what it triggers.

**Investments: in or out? What qualification and permission does it need?**

**Pensions and retirement: in or out? What does it need?**

**Protection: in or out? What does it need?**

**Holistic planning: in or out?**

## 02 The higher-risk specialisms

These carry extra permissions, qualifications and insurance loading. Choose deliberately.

**Defined-benefit pension transfers: in or out, and why?**

**Mortgages or equity release: a separate arm, or out?**

## 03 Your scope statement

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Talk to us

**Write your scope of advice in one plain paragraph.**

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