FINANCIAL ADVISORY LAUNCH PROGRAMME · IMPLEMENT THE RECOMMENDATION AND SET UP ONGOING SERVICE

First-client-advised milestone checklist

Implementation steps, ongoing-service setup, the first-review date, and a compliant review request. The closing certificate of the programme.

01 Implement and confirm

Some steps run on the provider's clock, not yours.

Applied to the platform or provider using your agency setup

Recommendation processed and confirmed in force

The whole thing recorded on the file

02 Set up the ongoing service

The service the ongoing fee actually pays for.

First annual suitability review scheduled

What the ongoing fee delivers, confirmed with the client

03 The milestone

Your first client advised and a recommendation put in place. The programme is complete.

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Talk to us

A review asked for at this high point, compliantly

Milestone marked: first client advised

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