FINANCIAL ADVISORY LAUNCH PROGRAMME · RUN THE TRUST-LED FIRST CONVERSATION

First-meeting agenda and disclosure script

A trust-first first-meeting structure with the mandatory disclosures built in.

01 Listen first

Understand the person before you mention a single product.

Their situation: what is going on in their financial life right now.

Their goals and their concerns, in their own words.

02 Your initial disclosure

Disclosing your status and how you charge at the first meeting is a regulated requirement, not an optional nicety.

Who you are, and your status: independent or restricted.

How you charge, and what an initial and ongoing engagement would cost.

What you can, and cannot, help with, said plainly.

03 Agree the next step

Trust is built by being clear about what happens next.

The next step into the advice process, and by when.

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Talk to us

What you each need to do before the next conversation.

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