

Pre-Meeting Update

Name:

Date:

In order to allow our time during your next review meeting to be more productive, I would be grateful if you would; complete and return your answers to the following questions in the pre-paid envelope provided, prior to your review meeting.

1. What has changed in your personal, professional and financial situation?

Update on your family, career and financial situation

2. Your Issues

An update from you on issues requiring attention

3. Asset & Liabilities Review

Reviewing your net worth, checking current interest rates and debt structure arrangements

4. Taxation Update

Reviewing opportunities and threats created by changes to tax laws

5. Pensions Update

Reviewing opportunities and threats created by changes to tax laws

6. Insurance Review

Providing a check of current levels of cover and policy wording

7. Estate Planning Review

Ensuring your Estate Planning wishes are current and legally valid

8. The "De-clutter the Paperwork" Service

Sorting through any paperwork received that confuses you

9. Family Review

Discussing any financial issues affecting your family/offspring

10. Professionals Update

Consultation with other professional advisers at your request i.e. Solicitor / Accountant

Your Aspirations – If we were meeting here 3 years from today, looking back over those years, what has to have happened both personally and professionally, during that period, for you to feel happy with your progress?

1.	
2.	
3.	
4.	
5.	

Your Concerns – What are your main concerns at the moment?

To help you, here are some answers given by other clients:

<input type="radio"/> Uncertain about insurance cover	<input type="radio"/> Pension details unclear	<input type="radio"/> My business is too reliably upon me
<input type="radio"/> Worried about inheritance tax	<input type="radio"/> Poor investment performance	<input type="radio"/> How will assets be split in a divorce
<input type="radio"/> Paying too much tax	<input type="radio"/> Don't keep good records	<input type="radio"/> Fearful of losing what I have created
<input type="radio"/> Don't have a plan	<input type="radio"/> No emergency fund	<input type="radio"/> What happens if I lose my job/business
<input type="radio"/> Too much debt	<input type="radio"/> My parents need help	

1.	
2.	
3.	
4.	
5.	

Your Opportunities – What specific opportunities are available to you, either now or in the next 3 years?

To help you, here are some answers given by other clients:

○ Purchase a new home	○ Give to charity	○ Engage in voluntary work
○ Increase personal wealth/family security	○ Start my own or another business	○ Spend more time with family
○ Sell my business	○ Pass assets to children	○ Send kids to private school/university
○ Do some home improvements	○ Learn a new sport or enjoy a new pastime	○ Gain job promotion or increase profitability
○ Help my children financially	○ Choose tax efficient investments	○ Go back to school or retraining
○ Purchase a holiday home or investment property	○ Take care of health and nutrition	○ Take more time off

1.	
2.	
3.	
4.	
5.	

Your Strengths – What are your top 5 strengths and things that give you an 'unfair advantage'?

To help you, here are some answers given by other clients:

○ Have a good job/profitable business	○ Have good health	○ Surplus cash for investment
○ Highly skilled and experience in chosen business/career	○ Very focussed and dedicated with strong self-belief	○ Optimistic about my future and have a positive outlook
○ Well educated	○ Expect to receive and inheritance	○ Lots of friends
○ Happily married	○ Hard worker	○ Retired with a good pension
○ Have company benefits and/or pension plan	○ No mortgage and debt free	○ Well organised and a good planner
○ Blessed with common sense	○ Like to help others and generous by nature	○ Good at getting the best from other people

1.	
2.	
3.	
4.	
5.	