TOP TIPS

10 THINGS TO DO BEFORE YOUR FIRST MEETING WITH A FINANCIAL ADVISER

Henson Crisp
making your future possible

Preparing for your first meeting with a financial adviser can make the process smoother and more productive. Here's a checklist of ten practical steps to help you get ready:

1 ☐ **CLARIFY YOUR GOALS**
Think about what you want to achieve. Is it retirement planning, selling a business, leaving a legacy, or something else?

2 ☐ **LIST YOUR PRIORITIES**
Rank your short and long-term objectives so your adviser understands what matters most to you.

3 ☐ **GATHER KEY DOCUMENTS**
Collect pension statements, investment summaries, and any other financial records.

4 ☐ **MAKE A NOTE OF YOUR CURRENT ASSETS**
Write down the assets you currently hold {property and any business interests) so your adviser can see the full picture.

5 ☐ **BRING YOUR INVESTMENT INFORMATION**
Make a note of any pensions, savings and accounts, ISAs, stocks or other investments you hold.

6 ☐ **REVIEW YOUR INCOME AND EXPENSES**
Prepare a simple breakdown of your monthly income and spending to give your adviser a clear picture of your cashflow.

7 ☐ **YOUR INVESTMENT PREFERENCES**
Consider how comfortable you are with investment risk, and any socially responsible investment preferences.

8 ☐ **NOTE ANY UPCOMING LIFE CHANGES**
Major events like marriage, retirement, or selling a business can impact your financial plan.

9 ☐ **PREPARE YOUR QUESTIONS**
Write down anything you want to ask, whether it's fees, services. or how advice is tailored to you.

10 ☐ **BRING IDENTIFICATION**
Most advisers will need proof of identity and address for compliance purposes.

This list is not exhaustive, if you feel you have something else you would like to bring along to your initial meeting then feel free to do so. We'll also send you a reminder closer to your appointment with details of any specific documents we need.

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