Advice Information Sheet

Introduction

Welcome to your Advice Information Sheet The purpose of this document is to guide you through the process of capturing the data that is necessary when you wish to provide Advice to your Client. We hope that this will make it easy for you to have all the relevant information required to have a meaningful discussion with your client.

It consists of two Parts:

Part I

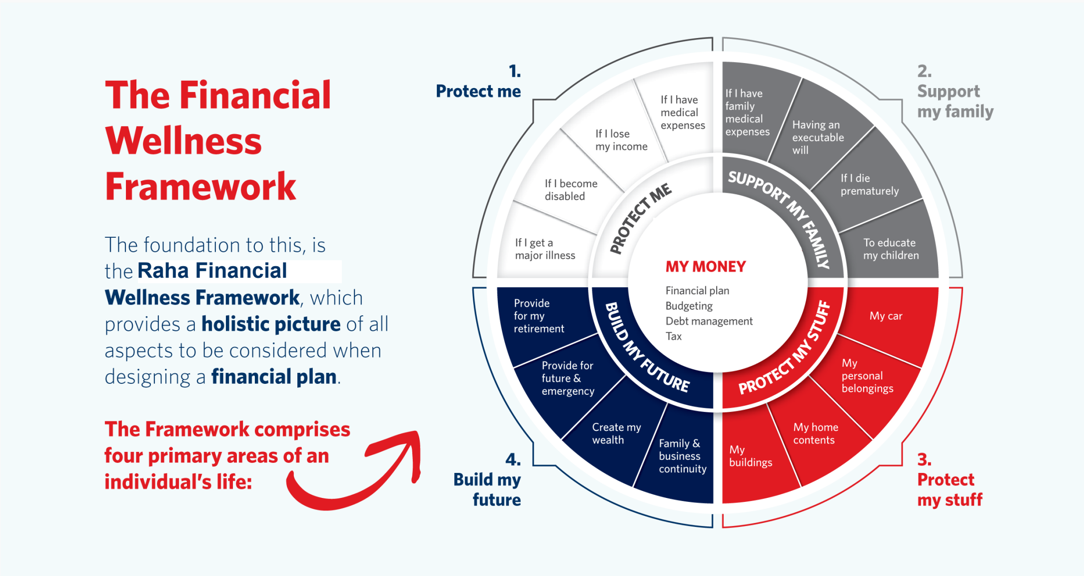
The actual data capture sheet that you need to complete in order to provide appropriate advice to your client with reference to the Financial Planning Wheel.

PART I

Data capture form

Client profile

Client name		Date	
Financial adviser			



Part II

Additional information relevant to some of the data you need to obtain from the client for each topic.

Some of the data fields may require you to have a deeper understanding of the topic.

We provide you with:

- **Problem:** A short summary of the problem regarding the specific topic;
- **RFS and Action:** The ideal solution and the RFS View.
- **Information Sheet:** 1-Pager about the topic