



Value Added Checklist

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An absolutely critical part of every annual review meeting should be to remind the client politely where you have added value during the previous 12 months.

Wherever possible quantify the wins for the client in cash. While not everything has a tangible cash benefit an awful lot of things do if you just think a bit harder.

Here is a suggestion for systemising the approach:

1.) Create a master list of value added areas like the one below. Add to this list every time you think of a new way that you or your firm has added value to its clients. All staff can have input into this. Turn it into a document (or field in your CRM system) that sits in each clients electronic file that allows anyone working on that client to record a piece of value added as it occurs. This will save you having to trawl through files in preparation for the annual review.

Value Added Checklist

Client Name: Mr XYZ Value Added Area	Benefit to Client (£££ wherever possible)
Investment <ul style="list-style-type: none"> • Extra returns • Costs saved 	
Tax <ul style="list-style-type: none"> • Pension tax savings • CGT tax savings • Investment earnings tax savings • Income tax savings • PAYE/NI savings 	
Insurance <ul style="list-style-type: none"> • Premiums saved • Claims paid out • Quality of cover (definitions) increased • Insurance premium tax savings 	
Education <ul style="list-style-type: none"> • Books recommended to client • Articles provided to client • Seminars held for client • External seminars recommended to client (and paid for by us for 'A' clients) 	
Debt <ul style="list-style-type: none"> • Interest saved • Debt made tax deductible & tax saved • Debt eliminated • Debt created (& value added as a result) • Debt re-structured successfully 	
Estate Planning <ul style="list-style-type: none"> • Wills established • Trusts established (& assets or people protected as a result) • IHT saved • Other tax saved 	
Problems Avoided <ul style="list-style-type: none"> • Recommendations to NOT do something • Strategies or structures established that avoid problems in future 	
Other Professionals <ul style="list-style-type: none"> • Referrals to other professionals • Tax saved as a result • Costs avoided as a result • Structures established as a result • Any benefits from advice given 	
Administration Hassle <ul style="list-style-type: none"> • Stuff ups fixed without the clients knowledge (hours spent) • Stuff ups fixed raised by the client (hours spent) • Benefits of fixing the stuff ups 	