

Annual Review Process Worksheet

Stage 1: Pre Client Review

Step	Activity	Timescale	Responsibility	Tools
1. Prepare Client For Review				
2. Inform FP About Appointment				

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Stage 2: Preparation Of Review Documentation

Step	Activity	Timescale	Responsibility	Tools
1. Prepare Review Documentation				
2. Finalise Review Pack				

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Stage 3: Client Review & Follow Up

(Meeting Will Last Up To Hr(S) + Additional Min For Meeting Notes)

Step	Activity	Timescale	Responsibility	Tools
1.Meeting Room Preparation				
2.Conduct Review Meeting				
3.Document Review Outcomes				

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Stage 3: Client Review & Follow Up

(Meeting Will Last Up To Hr(S) + Additional Min For Meeting Notes)

Step	Activity	Timescale	Responsibility	Tools
4. Meeting Follow Up To Client				
5. Report - Financial Plan Or Suitability Preparation				

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