New Client Screening Template



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Address: Email: How did you hear about us?* What was it specifically that prompted you to call?* Try to ascertain potential levels of business (investment, pensions, tax planning, insurance etc). Ascertain level of income and investable assets Confirm to client that the initial meeting is at our expense My office will forward you a meeting confirmation, which confirms the date and time of the meeting. Would you prefer the meeting confirmation letter posted in hard copy or emailed to you? Preference: EMAIL or POST	Client Name:	
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*admin questions if they take initial call	Meeting Date	



