

New Client Screening Template

Template

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Client Name:

Address:

Work Tel:

Mobile:

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

Meeting Date:

Time:

*admin questions if they take initial call