

| Process | Activity | Who is involved and time required | | | | | | Cost (£) |
|---|---|-----------------------------------|-------|-------------|-------|---------------|-------|----------|
| | | Adviser | Hours | Paraplanner | Hours | Administrator | Hours | |
| New client journey | Adviser introductory call | | | | | | | |
| | Appointment letter and fact find | | | | | | | |
| | Appointment confirmation call | | | | | | | |
| | Discovery meeting set up and arrangements | | | | | | | |
| | Review of fact find and pre-meeting prep | | | | | | | |
| | Discovery meeting | | | | | | | |
| | Report preparation and recommendations | | | | | | | |
| | Report production | | | | | | | |
| | Follow-up call | | | | | | | |
| | Appointment confirmation letter | | | | | | | |
| | Appointment confirmation call | | | | | | | |
| | Client meeting | | | | | | | |
| | Execution of recommendations | | | | | | | |
| | Client report schedules | | | | | | | |
| Thank you letter and confirmation of services and review date | | | | | | | | |
| Total cost | | | | | | | | |