



Thread Activation

Task 1a
Contact Client to book review meeting
Admin

Checklist

- 1. Send Review Fact Find?
- 2. Identify any changes to client circumstances
- 3. Book Appointment Time with client
- 4. If Email - send email appointment template ⚠

Outcome 1
Appointment Time Booked
Set Thread Base Date 1 = Date of Appointment

Outcome 2
Client Rejects/No Response

Task 1b
Send Client No Change RoA
CSM

- 1. Annual Fee Consent Required?
- 2. Review Client Information
- 3. Review IPS Data
- 4. Prepare Review Documents
- 5. Upload to File Note

Checklist

Task 2
Prepare Review Pack
CSM
If Fee Consent Required activate thread 4002

Task 3
Present Review Pack
Adviser
Activate 7 days prior to Base Date 1

Checklist

- 1. Confirm Diary appointment
- 2. Send Reminder to Client
- 3. Check Review Pack is ready
- 4. Adviser to define next steps
 - a. Hold RoA - No Change
 - b. RoA - Minor Change
 - c. SoA - New Strategies
- 5. Upload Review Meeting File Note ⚠

Task 4
Send follow up documents
Admin

Thread Complete