

Financial Guidance for Service Personnel and Veterans

FORCES MoneyPlan

Statement of Engagement



Personal
Finance
Society
Standards, Professionalism, Trust.



ARMED FORCES
COVENANT

Dear

I am writing to confirm the basis of our scheduled meeting as follows:

Address:

Date:

Time:

I also confirm the following:

- The meeting will be entirely free of charge
- The meeting will last approximately an hour (*delete/change as appropriate, subject to a minimum of 45 minutes*), during which time I will ask some basic questions in respect of your personal situation and finances to enable me to provide suitable guidance.
- If you can, please complete the attached 'fact find' and bring it to the meeting - it will save some time during our meeting but do not worry if you would rather go through this in person on the day
- The meeting will result in a written 'options and priorities' report to be sent to you (either by post or e-mail) within seven days of our meeting. This report will provide information and guidance in respect of your finances, including some key considerations, priorities, sources of further information and, if required, how to access regulated financial advice in respect of a personal recommendation as to any course of action you might subsequently wish to take (i.e. 'what you should do next').

If you are unable to attend the meeting for any reason, have changed your mind or wish to reschedule please let me know by telephone or email (details below) as soon as possible.

Telephone:

Email:

I look forward to seeing you on the day