



EXPLORATORY MEETING PREPARATION GUIDE

The objectives of the exploratory meeting:

1. To explore your current situation, where you believe you have a need for advice and to help us understand what you want to achieve, now and in the future.
2. To provide you with an insight into how we can potentially work together and what you can expect from a relationship with us.
3. For both of us to assess all the relevant information and determine whether it is appropriate that we proceed to the next step.

How should I best prepare for this discussion?

For us to create the most benefit for you, please review the 'what to think about' client preparation guide contained in your information pack. This guide is designed to help you think through some of the key components of our discussion prior to our meeting.

What information and documentation should I bring with me?

As the main objective of this meeting is to get to know each other better, there is no need to bring a lot of documentation. However, if there is information and/or documentation that you would like to share at this stage, please bring it with you.

How much time should I allow?

You should set aside one hour and fifteen minutes. We may not need all that time however, it is best to allow for it.

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How much is this meeting going to cost me?

The exploratory meeting is at our cost. However, if we both agree to proceed to the next step(s) there will be an applicable fee, which will be clearly explained during our meeting.

How do I get to your office?

To make it easy to find us, travel details and our office location are contained in the travel guide included in your 'exploratory meeting information pack'.