

# **Financial Planning Mutual Commitment**

## **Laurie Bonser, Planner & Coach**

1. Explain the planning process, timeline, and remuneration upfront
2. Ask questions and listen intently throughout the planning process
3. Safeguard client information and ensure confidential discussions
4. Customize recommendations and suggestions for each client based on the scope of the agreed planning needs
5. Provide a written summary of recommendations and actions steps
6. Share professional experiences to demonstrate how recommendations work and generate benefits
7. Provide education, guidance, and explanations of options
8. Respond to client communications within 24 hours as a general practice

## **Client Participation**

1. Own the personal planning process as a vital part of your life
2. Ask questions about the planning process and topics
3. Share information about concerns, goals, and needs as critical components of the planning process
4. Provide documentation as requested in agreed timeframes
5. Prepare for scheduled appointments for effective meetings
6. Share changes in circumstances, goals, and needs as they occur
7. Commit to implement chosen actions steps to fulfill your planning goals
8. Respond to planner inquiries within 48 hours as general practice