‘CREATING SPACE FOR BETTER DECISIONS’ CHECKLIST

PRE-MEETING	DONE
Check whether this is good timing for your client to engage with financial decisions, or whether another date may be more appropriate.	
Ask what time of day works best for them?	
Send a reminder ahead of the appointment.	
Let them know in advance what information or documents will be needed.	
Reassure them that they will receive a written summary after your discussion.	

DURING THE MEETING	DONE
Remind them that there is no need to remember everything and that notes will be provided.	
Create a comfortable environment with the option for breaks.	
Set clear expectations about the purpose of the meeting and any decisions required.	
Consider limiting the number of decisions to avoid decision overload.	

Be open to splitting the discussion across two meetings if appropriate.	
Pay attention to signs of fatigue, stress or difficulty processing information.	
Check in regularly: "any questions so far?" or "Would you like me to go over that again?"	
Follow a clear and logical structure.	
Keep explanations concise and avoid unnecessary jargon.	
Be prepared to slow down, pause or reschedule if the client appears overwhelmed.	

POST MEETING	**DONE**
Confirm when they will receive the meeting notes and summary.	
Clearly set out any decisions, actions or next steps via simple recap, along with any deadlines.	
If no further action needed, clearly state this.	
Let them know they can contact you if they would like to revisit any part of the discussion.	
Offer to proactively follow up if you have not heard from them by an agreed date.	

Women's WEALTH Alliance
CONSUMER DUTY ALLIANCE

Produced in association with:
Debbie Taylor, Certified Life Coach

https://messylifecoach.co.uk/

MESSY LIFE COACH