

Discovery Session

Your Discovery Session is the first step in the financial planning process. It is a friendly, guided discussion between you and your adviser that provides you with the opportunity to consider your goals and ambitions for the future, as well as beginning to think about how you can leverage your personal finances to achieve them. Discovery sessions typically last around 60-90 minutes, are conducted at our expense and without commitment.

Session Aims:

- For us to get to know you better; what has prompted you to make contact and how you would like us to help.
- For you to get to know us better; what makes our approach to financial planning different and how we can support you.

Is there anything I need to do to prepare?

It is not essential for you to prepare anything specific ahead of your discovery session, but there are a few things you could start thinking about to help with the discussion:

- What are the things in life that matter to you most?
- What sort of a life would you like to live both now and in the future?
- Are there any factors that are getting in your way?

Financial Information and Documentation

In addition to the wider discussion around your plans and objectives, your adviser will need to understand your financial circumstances in more detail.

Here is a list of some of the more technical information your adviser will ultimately require, but please don't worry if this information is not all readily available. Your adviser can support you in obtaining or producing any of the detail that you don't already have:

- Income details (payslips and/or tax return information)
- Investment/pension/savings details or account statements
- Outgoings information (here is a link to our [outgoings analysis template](#) which you may find useful)
- Liabilities information (amounts outstanding, interest rates, monthly payments)

After the Session

Following the session your adviser will provide you with a document called a Requirements Summary. The purpose of the Requirements Summary is to:

- Provide a brief overview of your current financial position.
- Define the purpose and structure of the financial planning work to be undertaken and clarify the desired outcomes.
- Confirm Find Peace of Mind's fee for the proposed work