

# What To Do Next...



**Dear (First Name),**

Congratulations! You have now successfully completed both your scoop and carryback assessments!

To prepare yourself for client meetings, you should get familiar with the following:

## **CLIENT MATERIALS**

These two documents are essential and must be provided and distributed to every client.

[Initial Disclosure Document \(IDD\)](#)

[Client Privacy Notice Brochure](#)

## **INTRODUCTION SCRIPT**

This script can be found on page 7 of your [Fast Track Workbook – Business Basics](#) **Part 2: Follow the System** and must be learnt and mastered, as this allows you to build genuine rapport with your clients before you deliver their financial education.

## **CLIENT PRESENTATION (KTP)**

The Kitchen Table Presentation is presented to ALL clients; this presentation highlights what Genistar can offer and provides your client with financial education. **Click here to [automatically download your KTP](#)**

For any further guidance, please contact your upline or EVP. They will be able to help you and get you focused on achieving the next steps on your Genistar Journey!

Yours in success,

**Genistar Field Support Centre Team**

**020 3372 5085** | [Genistar.Online](https://www.genistar.com)

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Registered Office: Victoria House, Harestone Valley Road, Caterham, CR3 6HY

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