Meeting files — 214 clients to call

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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940 files prepared, sorted by what has moved · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **The file brings together quantified, dated facts.** The recommendation is written and signed by the adviser: it is what engages the duty of advice, and it is what the client pays for.

The six elements gathered for each client

Element	What is measured	Volume across the 940 clients
Allocation gap to the recorded profile	**With its cause: market effect or transaction made**	**46 clients outside their band, 12 of them for more than six months**
Concentration	Any holding above 10 % of consolidated assets	**67 clients, 12 of them above 20 %**
Idle cash	**Above 5 % of assets and more than 3 months without a transaction**	**128 clients, €4.1m**

Element	What is measured	Volume across the 940 clients
Actual charges for the period	Compared with the firm's average for a comparable wrapper and size	All wrappers
Deadlines in the next 12 months	End of contract, end of lock-in, regular deposit ending, rent review	All contracts
Documents to update	**Risk profile not reviewed for more than 24 months**	**91 clients**

Where to start

Group	Volume	Proposed treatment
Clients showing three gaps or more	**38**	**Your first 38 calls — files and slots ready**
Clients showing at least one gap	214	This quarter's round
Others	726	Report sent, meeting at the usual pace

The distinction between market effect and transaction made matters more than it seems: in one case the portfolio drifted on its own, in the other a decision was taken. It is not the same meeting, and not the same explanation to give.

> **Every file goes out with three slots in the diary of the adviser who follows the client.** The list is approved in one read, and the round is under way before lunch.

For the firm to set

Concentration threshold chosen for the alert: _____ %

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