Dispatch mandate — capped and dated

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

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Written, withdrawable with a single word · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **The mandate covers sending documents ALREADY signed by their adviser.** An unsigned document does not go out, and no dispatch contains a recommendation.

What the mandate covers

Act	Condition	Where the rule comes from
Sending the quarterly reports	**Signed by their adviser, format and wording approved by compliance**	**The firm's template**
Recipients	**Clients not marked « hand delivery »**	List kept by the partners

What caps it

Limit	Rule

Content	**No recommendation in a dispatch — it is handed over in a meeting or under the adviser's signature**
Exclusions	**34 clients marked « hand delivery » — the firm's largest accounts**
Frequency	**One campaign per quarter only, on the dates set by the partners**
Duration	**Review after three months. Without an explicit decision, the mandate stops — renewal is what takes a signature**
Withdrawal	**One word, effective within the minute; the dispatch reverts to a manual campaign**

What it is worth, on the firm's own figures

Measure	Before	Under mandate
Dispatch campaign	**3 weeks**	**40 minutes**
Document arriving after quarter end	**34 days**	**6 days**
Middle-office time	3 weeks per quarter	**Returned to preparing the files**

The next day's report

Indicator	What it showed at the last dispatch
Documents sent	940
Documents opened	**Tracked client by client**
Failed addresses	**11 out of date, corrected — the 11 clients received their document**

> **The mandate creates no new rule:** it gives in advance, in writing, the decision to send documents the firm has already signed — and the log ties every dispatch to its signature.

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For the partners to set

Campaign dates and review date: _____

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