Next steps

Include all that apply

* I’ll be happy to help you complete any application forms and other documents needed to act on my recommendations.
* Please complete and return INSERT\_2 as soon as possible.
* Trusts Please ensure that each of your trustees receives a copy of the Trust Information Sheet I’ve given you.
* Disposal As I’ve recommended you dispose of a product(s), I’ll take your written authority to do this. Once the proceeds are received from your existing provider, I’ll arrange the reinvestment. I’ll stay in touch with you in case of any delays.
* Cash/Cash ISA recommendation As I can’t advise you on specific Field\_1 accounts, you’ll need to select a suitable account and complete an application form directly with your chosen provider.
* Transfer to Cash ISA Your Cash ISA transfer must be arranged by your chosen provider, once you’ve completed their transfer application form, otherwise you may lose the tax benefits.
* I’ve arranged a further meeting for us on INSERT\_3.
* If you find that anything in this report, or other documents, is unclear, I’ll be happy to explain it.
* You may be contacted by a member of our ‘Quality Assurance Team’, who will ask you about the service you’ve received and your understanding of my advice. If you’re happy to assist with this, please feel free to answer their questions openly.

To help us further improve our service, you may also be asked to complete a customer satisfaction survey by a company called MaritzCX (who have been commissioned to do this on our behalf). If you receive an email asking you to participate (from contribute@voice-your-views.hsbc.com), we’d really appreciate you sparing a few minutes to complete the survey. Thank you.