Openwork

Save | Save & close | Smart flows | Refresh | Check access | Email a link | Run report

Client engagement (CE0014651) - Simon Curd

Information

Full	In Progress	Concert Training 43
Type	Status Reason	Owner

Summary | Client Objectives | Attitude to Risk | KYC | Future Changes | Needs | Needs Analysis | Recommendation | SR/SL | Activity/Notes

Couldn't refresh engagement status Try again

Engagement incomplete

You have completed 2 of 13 sections

1. Client/objective — Completed

- Client/special care → Completed
- Personal details → Completed
- Initial meeting details → Completed

2. KYC — In progress

3. Borrowing — Completed

4. Protection — In progress

5. Property — Not started

6. Quote — Not started

7. Recommendation — Cannot start yet

8. Protection validation — Not started

9. Suitability report — Cannot start yet

10. Application — Cannot start yet

11. Document checklist — In progress

12. Commission — Cannot start yet

13. Submission — Cannot start yet

Mr Simon Curd

Mobile phone 07888888888

Email mattjones@gmail.com

Engagement timeline

14:39, 20th July 2021 — Phone call

Sent email to Stuart discussing mortgages

by Harry

14:39, 20th July 2021 — Appointment

He called to update his new property address and enquiry some issues he is concerning.

by Harry

14:39, 20th July 2021 — Task

He called to update his new property address and enquiry some issues he is concerning.

by Harry

14:39, 20th July 2021 — Email

He called to update his new property address and enquiry some issues he is concerning.

by Harry

14:39, 20th July 2021 — Note

He called to update his new property address and enquiry some issues he is concerning.

by Harry

View all