

Client engagement (CE0014651) - Simon Curd

Full Type	In Progress Status Reason	Concert Training 43 Owner
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- Summary** Client Objectives Attitude to Risk KYC Future Changes Needs Needs Analysis Recommendation SR/SL Activity/Notes

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

Add note

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

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14:39, 20th July 2021

Note

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