

Client engagement (CE0014651) – Simon Curd

Information

Type	Status Reason	Owner
Full	In Progress	Concert Training 43

- Summary** Client Objectives Attitude to Risk KYC Future Changes Needs ...

New property purchase

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

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](#)