



## 5 tips for telephone based advice



### **Purpose**

Taking the time to outline the reason for the call and sticking to those parameters can ensure communication is clear and precise, for example if you're calling to discuss the KFI be sure to keep on topic but allow for relevant questions.



### **Prepare**

Just as with face-to-face advice it's important to be prepared, but technology can have a habit of misbehaving at inopportune times. Be sure to arrange a call before the advice appointment, in particular if you're intending to video call your client.



### **Record**

It's prudent to keep a record of all the advice you give your clients, many video call applications offer you the chance to record meetings, additionally many smart phones also include this option. Please ensure you have your clients consent before doing so.



## Video

Engaging with your client can be easier over video chat, in the absence of face-to-face advice it's important your client is comfortable and at ease when discussing sensitive matters.



## Recap

End every call or video call with a brief but precise recap of the points you've covered, this will allow your client the opportunity to question any points they may have missed and ensure everyone is on the same page.

## Start referring today

It only takes a few minutes to register and make an equity release referral, just visit [www.keypartnerships.co.uk](http://www.keypartnerships.co.uk). Or contact us:



[refer@keypartnerships.co.uk](mailto:refer@keypartnerships.co.uk)



0800 138 1663

This is intended for intermediaries only and has not been approved for customer use.

Key Partnerships, Baines House, 4 Midgery Court, Fulwood, Preston, Lancashire PR2 9ZH. Key Partnerships is a trading name of Key Retirement Solutions Ltd. Registered in England No. 2457440. (04/20). © Key Retirement Solutions Ltd 2020