

## **Reason Why Letter**

Why choose this product:

Why choose this type of insurance/investment:

Why choose this company/brand name:

After Fact Finding, client situation:

Client needs and your recommendation:

Client accept your recommendation:      Client NOT accept, Why?

Any other products suggested:

Follow up plan:

If Segregated funds, explain different fee structures: front-load, no load, DSC:

Any questions, any unclear, anything sounds not right:

Client signatures:

Advisor signatures:

Date: