

Advice Record: Level 1

Date (dd/mm/yy): __ / __ / __

Client should be offered a copy if seen in person unless it would be prejudicial to their situation

How the advice was provided: [face-to-face] [by telephone] [by letter] [by email]

Client details:

Surname: Forename:

Address: Telephone:

1. Enquiry outline (consider bullet-pointing main aspects or refer to attached written enquiry):

(Continue overleaf with ref: 1)

2. Advice/action agreed/taken (note key dates) or refer to attached copy of written response:

(Continue overleaf with ref: 2)

Name of adviser and position:

Copy of advice record offered: [YES] [NO] [N/A]

Client accepted (and copy of advice record provided): [YES] [NO] [N/A]

Standard service information (including complaints) leaflet provided: [YES] [NO] [N/A]

Total time spent (minutes): Input onto system (tick):