

Your first conversation.

You do not need a perfect plan or a stack of documents. A few thoughts and questions are enough to begin.

Think about what matters

- ☐ What would you like your money to make possible?
- ☐ What is your main question or concern today?
- ☐ Are there upcoming changes in work, business or family life?

Questions you might ask Vijai

- ☐ How would you approach my priorities?
- ☐ What services would be involved, and how are you paid?
- ☐ How would we communicate and review progress?
- ☐ What would happen after this meeting?

Optional: have a few details handy

- ☐ A general picture of your savings, debts and income.
- ☐ Existing investment, insurance or pension summaries, if useful.
- ☐ For business owners: a broad outline of your business interests.

Before the meeting

- ☐ Confirm the date, time and meeting format with Vijai.
- ☐ Write down anything you want explained in plain language.
- ☐ Bring a partner or trusted person if you would like their support.

Keep sensitive documents private.

Do not send account numbers, identification or confidential records through the demo website. Ask Vijai how to share documents securely if they are needed later.