

# Pre-Appointment Kit 6

## Our Partnership With Optimize

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**Note:** In this section use this opportunity to showcase the benefits your clients will experience because of this partnership (i.e. access to resources and expertise). Sometimes the firm has approved content that may be suitable for this piece.

*Keep this piece to one page.*

### Our Partnership With Optimize

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We have chosen to work in partnership with Optimize to ensure we can offer our clients financial planning advice and solutions second to none.

With Optimize as our partner, we can also ensure our financial planning practice is able to deliver exceptional client service and at the same time allow us to have access to the broad range of expertise required to plan, implement and monitor our comprehensive financial planning approach.

