Selborne Crest | the first conversation

Planning conversations for owners and families | Current edition: 15 November 2026

Start with the decision: an expected business transaction, retirement timetable or family priority. Explain who needs to be involved and what remains uncertain.

Describe the approximate timing. A business sale in 18 months can bring ownership, income and family questions together. It does not determine an investment recommendation.

An introductory message should be a summary, without identity documents, account numbers or detailed financial records. This document is a conversation checklist, not a fund, financial product or recommendation.

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Fees, agreed scope and next steps need discussion. No universal fee, guaranteed return or minimum portfolio value is stated.

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Fictional demonstration content. No financial services are available here.