FOUNDATIONS · RESOURCE 11

Structuring Information for Neurodivergent Clients

TL;DR · QUICK SUMMARY

- Financial information can quickly become overwhelming, particularly when multiple options, risks and actions are presented at once.
- Clear, structured communication can improve understanding, confidence and engagement.
- The goal is not to simplify the client's finances, but to make information easier to process.
- Good information design benefits all clients, not just neurodivergent clients.

A Note Before You Read On

Why This Matters

Financial planning can involve large volumes of information, technical terminology and complex decision-making.

For some clients, too much information delivered at once can create confusion, overwhelm or decision fatigue.

Providing information in a structured and accessible way can help clients engage more confidently throughout the planning process.

What This Might Look Like

A client may:

- Ask for information to be repeated.
- Feel overwhelmed during reviews.
- Struggle to identify key actions.
- Focus on smaller details while missing bigger priorities.
- Delay decisions because there feels like “too much to think about.”

What You Can Do

1. Keep Information Clear

- Prioritise the most important points.
- Use plain language wherever possible.
- Reduce unnecessary jargon.
- Explain one concept at a time.

2. Create Structure

- Start with the overall objective.
- Break discussions into logical sections.
- Clearly separate information, options and actions.
- Summarise regularly.

3. Highlight Key Takeaways

Help clients identify:

- What this means.
- Why it matters.
- What happens next.

Helpful Phrases You Can Borrow

You don’t have to use these exact words — take what fits and leave the rest.

> “Let’s focus on the key points first.”

> “There are three main things I’d like you to take away from this discussion.”

> “I’ll summarise the important actions at the end so everything feels clearer.”

Quick Tips

- Less information is often more effective.
- Prioritise clarity over complexity.
- Use plain language.
- Summarise key points frequently.
- Separate information from actions.
- Avoid overwhelming clients with multiple decisions at once.
- Check understanding throughout the conversation.

Before You Go

Most clients don’t need more information.

They need information presented in a way that feels manageable and meaningful.

Sometimes the simplest adjustment is simply making things easier to follow.