

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

This resource offers general guidance and reflects common experience, not professional, legal, medical or financial advice. It is not a substitute for employment law, HR policy, occupational health guidance, or individual professional assessment. Every person's experience of neurodivergence is different, so please adapt anything here to your own situation. The Uniquely Wired Network does not accept liability for decisions, actions or outcomes arising from the use of this material. If you need advice specific to your circumstances, please consult a qualified professional (e.g. HR, legal, medical, or financial advisor).

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.