**The Lifetime Planner**

Client Pre-Meeting Questionnaire

 By completing this information you will not be committed to using our service, and we will not be committed to working with you. All information is confidential and is not shared with any third party organisation.

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| --- | --- | --- |
| **Personal Details** | | |
|  | **Self** | **Partner/Spouse** |
| Title |  |  |
| Surname |  |  |
| Forenames |  |  |
| Marital Status |  |  |
| Smoker | Yes / No | Yes / No |
| Male or Female |  |  |
| General State of Health | Good / some past problems | Good / some past problems |
| Place of birth |  |  |
| UK resident since |  |  |
| UK resident for tax | Yes / No | Yes / No |
| Intention of living abroad in future | Yes / No | Yes /No |
| Date of birth |  |  |
| NI Number |  |  |
| Address |  |  |
| Postcode |  |  |
| Telephone Home |  |  |
| Work |  |  |
| Car/Mobile/Other |  |  |
| Fax |  |  |
| E-mail |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Children** | | | |
| **Name** | **Relationship** (Self/Partner or Both) | **Date of birth** | **Dependant?**  **Y / N** |
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| **Income Details** | | |
|  | **Self** | **Partner/Spouse** |
| Occupation |  |  |
| Employment Status | Employed / Self-employed / Retired | Employed / Self-employed / Retired |
| Employer |  |  |
| Employers Address |  |  |
| Income from employment | £ | £ |
| Income from Investments | £ | £ |
| Income from Pensions | State £  Employer £  Private £ | State £  Employer £  Private £ |
| Other Income | £ | £ |

|  |  |  |  |
| --- | --- | --- | --- |
| **Insurance Policies** | | | |
| **Type of Policy** | **Maturity Date** | **Sum Assured** | **In Trust** |
|  |  | £ | Y/N |
|  |  | £ | Y/N |

|  |  |  |  |
| --- | --- | --- | --- |
| **Financial Assets** | | | |
| **Asset Class** | **Self** | **Partner / Spouse** | **Joint** |
| Bank & B/Soc Accounts | £ | £ | £ |
| Cash ISA’s | £ | £ | £ |
| National Savings | £ | £ | £ |
| PEP’s | £ | £ | £ |
| Investment ISA’s | £ | £ | £ |
| Investment Bonds | £ | £ | £ |
| Unit Trusts & Investment Trusts | £ | £ | £ |
| Shares | £ | £ | £ |
| Pension Funds | £ | £ | £ |
| Total | £ | £ | £ |

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| **Real Assets** | | | |
| **Asset Class** | **Self** | **Partner / Spouse** | **Joint** |
| Residential Property | £ | £ | £ |
| Additional Properties | £ | £ | £ |
| Business Assets | £ | £ | £ |
| Total | £ | £ | £ |

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| --- | --- | --- | --- |
| **Liabilities** | | | |
|  | **Mortgage** | **Secured Loans** | **Unsecured Loans** |
| Balance Outstanding | £ | £ | £ |
| Monthly Payment | £ | £ | £ |
| Interest Rate | % | % | % |
| End Date |  |  |  |
| Repayment Type |  |  |  |

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| --- | --- | --- |
| **Estimated Expenditure** | | |
|  | **Monthly** | **Annually** |
| Mortgage / Rent | £ | £ |
| Loans /Credit Card | £ | £ |
| Housekeeping (food, cleaning etc.) | £ | £ |
| Utilities | £ | £ |
| Motor Expenses (fuel, tax, insurance) | £ | £ |
| Insurance and Policies | £ | £ |
| Entertainment | £ | £ |
| Other | £ | £ |
| Total Estimated Expenditure | £ | £ |

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| --- | --- | --- | --- | --- |
| **Pensions** | | | | |
| **Whose Pension** | **Pension Provider** | **Type of Pension** | **Appropriate Pension Value or Future Income** | **Retirement Date** |
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|  | Death In Service? |  |  |  |

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* **Wills & Trusts In Place**

**If you have an existing Will in place, please forward a copy on so we can also review it.**

* When was your Will written?
* Who are the beneficiaries?
* What changes do you want to make to your Will?
* What Trusts do you have in place?
* What Inheritance do you expect to receive in the near future?

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* **Areas to Focus on**

When meeting us, what areas do you want us to focus on?

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If we were to work with you, what would you expect to have happened over the course of the next year for you to be happy with the work we have produced?

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* **Declaration**

The information contained in this document is correct to the best of our / my knowledge. I / We understand that the quality of any advice given will be dependant upon the accuracy of the information provided to you.

Signed Date

Signed Date