

Employment Status

	Self	Partner/Spouse
Occupation		
Type of Employment	Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Retired <input type="checkbox"/>	Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Retired <input type="checkbox"/>
Employer		
Employers Address		
National Insurance No.		
Income from Employment	£	£
Income from Investments	£	£
Income from Pensions	State £	State £
	Employer £	Employer £
	Private £	Private £
Other Income	£	£

Property

Asset Class	Self	Partner / Spouse	Joint
Residential Address	£	£	£
Additional Properties	£	£	£
Business Assets	£	£	£
Total	£	£	£

Investments

Asset Class	Self	Partner / Spouse	Joint
Bank & B/Soc Accounts	£	£	£
TESSA's	£	£	£
National Savings	£	£	£
PEP's	£	£	£
ISA's	£	£	£
Investment Bonds	£	£	£
Unit Trusts & Investment Trusts	£	£	£
Shares	£	£	£
Pension Funds	£	£	£
Total	£	£	£

Insurance Policies

Life Assurance Provision	Maturity Date	Sum Assured	Owner	In Trust
		£		Y/N
		£		Y/N
		£		Y/N
		£		Y/N

Liabilities

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

Expenditure

	Monthly	Annually
Mortgage	£	£
Loans / Credit Card	£	£
House Keeping (food, cleaning etc.)	£	£
Utilities	£	£
Motor Expenses (fuel, tax, insurance)	£	£
Insurances' and Policies	£	£
Entertainment	£	£
Other	£	£
Total estimated Expenditure	£	£

Wills & Trusts

Do you have a will in place? If yes please enclose copies, if no who do you wish to Benefit from your estate?

What changes do you want to make to your Will, if any?

What Trust arrangements do you have in place?

Are you expecting any Inheritance in the near future?

Do you have a power of attorney in place so your affairs can be dealt with?