

Personal Client Questionnaire

Independent Financial Advice Centre
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Strictly Confidential

This Questionnaire has been designed in line with The Financial Services Act 1986 and subsequent consumer legislation, to obtain information to assist in preparing a detailed Report on your financial needs. The information provided by you will be kept in the strictest confidence and is only required to provide you with the best possible advice.

Adviser.....	Source.....
Key Facts about Services and Costs	Date given
Terms and Conditions of Business	Date given.....
Guide to Investment services, charges and fee agreement	Date given/completed.....
Personal Client Questionnaire	Date completed.....
Risk Profile Questionnaire	Date completed.....

Personal Details

Client

Partner

Title:

Forename:

Surname:

Maiden Name:

Date of Birth:

Place of Birth:

Nationality

Nationality

Marital Status:

Date Married:

Address Details

Main Residence:

Tenure:

Post Code:

Home Telephone

Clients Mobile

Partners Mobile

E-mail Address

Partners E-mail Address

Tax Residency

Tax Residency

Other status overseas

Other status overseas