

Date of second meeting:

CONFIDENTIAL



CLIENT: _____

Date of first meeting: _____

TEL. No. _____

CELL.No. _____

BEST TIME TO CONTACT _____

EMAIL: _____

PLAN/POLICY NO. _____



[Click here to view our corporate keynote](#)

PERSONAL INFORMATION

NAME DATE OF BIRTH NATIONALITY

SPOUSE NAME DATE OF BIRTH NATIONALITY

	CHILDREN'S NAMES	AGES	CURRENT UNIVERSITY PROVISION	FUTURE UNIVERSITY NEED
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



EMPLOYMENT INFORMATION

JOB TITLE EMPLOYER

PRIOR COMPANY SINCE

SALARY DETAILS BONUS

JOB TITLE (SPOUSE) EMPLOYER

SALARY DETAILS BONUS

OTHER INCOME

OUTGOING / EXPENSES					
Supermarket	Electricity/ Water	Car	Mortgage	Personal Care	Family
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Food	Tel/Cel/Int/TV	Insurance	Sport	Service	Support Other
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
School	Gasoline	Rent	Holidays	Loans	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
TOTAL: <input type="text"/>			MONTHLY SURPLUS	<input type="text"/>	

PROPERTIES			
Property Type	Mortgage	Term	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

CURRENT SAVINGS			
BANK	Short Term	Medium Term	Long Term
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
TOTAL	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

LOANS / DEBTS		
Credit cards	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal loans	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

EXISTING WEALTH

STOCKS _____

INVESTMENT FUNDS _____

PENSION OR RETIREMENT PLAN _____

EXISTING PROTECTION

LIFE INSURANCE

SUM ASSURED _____

MEDICAL EXPENSES

FAMILY COVERAGE

INTERNATIONAL

LOCAL

Do you know another wealth adviser or insurance agent?

PRIORITIES

- | | | | |
|--|-------------------------------------|--|---|
| <input type="checkbox"/> RETIREMENT PLANNING | <input type="checkbox"/> INVESTMENT | <input type="checkbox"/> LIFE INSURANCE | <input type="checkbox"/> BANK ACCOUNT \$/€/ |
| <input type="checkbox"/> EDUCATIONAL FEES PLANNING | <input type="checkbox"/> S TRUSTS | <input type="checkbox"/> MEDICAL INSURANCE | <input type="checkbox"/> £ OTHER |

INVESTMENT OBJECTIVES & RISK PROFILE

What is the Investment Priority:

- PRODUCE A REGULAR INCOME
- GROW THE CAPITAL OVER THE MEDIUM TERM (+5 YEARS)
- GROW THE CAPITAL OVER THE LONG TERM (+10 YEARS)

RISK QUESTIONNAIRE



RISK LEVEL = VOLATILITY



5 YEARS



5 YEARS



5 YEARS

ABC INVESTMENT STRATEGY

DYNAMIC
AGGRESSIVE

MODERATE
BALANCED

LOW
CONSERVATIVE

5	4	3	2	1
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REFERRALS

	NAME	TEL No.	COMPANY	LOCATION
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

INDEPENDENCE, SECURITY & SERVICE




RETIREMENT / EDUCATION FUND CALCULATION

DESIRED MONTHLY INCOME

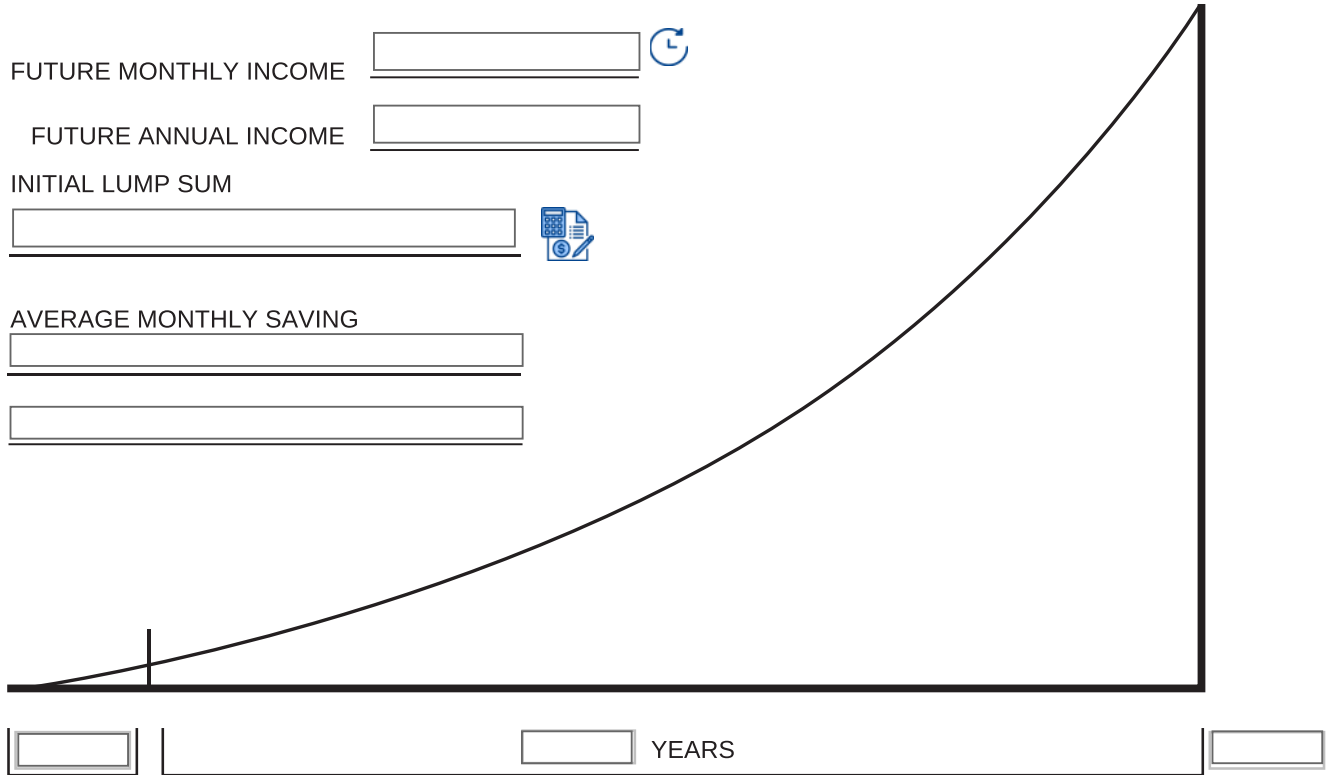
 FINAL AMOUNT OBJECTIVE

FUTURE MONTHLY INCOME 

FUTURE ANNUAL INCOME

INITIAL LUMP SUM 

AVERAGE MONTHLY SAVING



REQUIREMENTS TO DESIGN "YOUR TAILORED INVESTMENT PLAN"

PROJECTIONS AMMOUNT

TERM:
 INITIAL LUMP SUM:

CONTRIBUTION FREQUENCY

BACKDATE Max 24 months

USD EUR GBP OTHER

- INCREASE SAVING
- DECREASE SAVING
- VOLUNTARY LUMP SUMS
- SUSPEND TEMPORARILY
- PARTIAL WITHDRAWALS

- INTERNATIONAL LOCAL
- TAX DEDUCTION TAX EFFICIENT GROWTH
- TRUST
- INVESTMENT PROFILE AUTOMATIC ABC

CLIENT DECLARATION

I DECLARE THAT THIS IS A TRUE REFLECTION OF MY PERSONAL AND FINANCIAL CIRCUMSTANCES. BASED ON THIS INFORMATION, I AUTHORIZE MY ADVISOR TO SEARCH THE OPTIONS MOST RELEVANT TO MY PROFILE AND I AGREE WITH THE PRIVACY NOTICE ON THE WEBSITE.

DATE