

About You

Please tell us about yourself and your partner.

FINANCIAL PLANNING QUESTIONNAIRE

you		spouse / partner		notes
*◊ Forename				Anything else we need to know?
*◊ Surname				
*◊ Gender	☐ Male ☐ Female	☐ Male ☐ Female		
*◊ Date of Birth (dd/mm/yyyy)				
*◊ Marital Status	☐ Married / Civil Partnership ☐ Non-Legal Partnership ☐ Single			

address	
Address Line 1	
Address Line 2	
Town/City, County	
Post Code, Country	

you		spouse / partner	
Home Phone			
Business Phone			
Mobile			
Email			

you		spouse / partner	
Are you a UK resident?	☐ Yes ☐ No	☐ Yes ☐ No	
Are you ordinarily a UK resident?	☐ Yes ☐ No	☐ Yes ☐ No	
UK Domiciled?	☐ Yes ☐ No	☐ Yes ☐ No	
*◊ Are you retired?	☐ Yes ☐ No	☐ Yes ☐ No	
*◊ If no, at what age will you retire?			

Household Expenses

Please choose one of the following methods to enter your total household expenses:

Enter Total Household Expenses ◦

£

Yearly

Monthly

OR

Fill out Expenses Worksheet below

BASIC EXPENSES

expense ◦	amount ◦	paid ◦	
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
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	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly

LEISURE EXPENSES

expense ◦	amount ◦	paid ◦	
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
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	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly

Household Expenses (cont.)

LUXURY EXPENSES

expense ◦	amount ◦	paid ◦	
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
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	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly
	£	☐ Yearly	☐ Monthly

FUTURE GOALS - MILESTONE EXPENSES

expense ◦	amount ◦
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£

★ required for plan ♦ conditional, required for item ◦ importable