SEYMOUR
FINANCIAL
PERSONAL LIFE PLANNERS

The Lifetime Focuser

Client pre-meeting questionnaire

Client Name

Completion of this questionnaire will allow us to prepare for your meeting, so that it can be both productive and interesting. The more accurate your information, the more effective the meeting can be.

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 unauthorised third-party organisation.

Personal Details

Self

Title

Surname

Forenames

Marital Status

General state of health ☐ Good ☐ Some ☐ Poor ☐ Past problems

Smoker ☐ Yes ☐ No

Date of birth Gender

Place of birth

UK resident since

UK resident for tax ☐ Yes ☐ No

Intention of living abroad in future ☐ Yes ☐ No

Address

Postcode

Contact Home Work

Mobile Fax

Email

Partner/Spouse

Title

Surname

Forenames

Marital Status

General state of health ☐ Good ☐ Some ☐ Poor ☐ Past problems

Smoker ☐ Yes ☐ No

Date of birth Gender

Place of birth

UK resident since

UK resident for tax ☐ Yes ☐ No

Intention of living abroad in future ☐ Yes ☐ No

Address

Postcode

Contact Home Work

Mobile Fax

Email

Do you have any dependants? If YES, please give details.

Name

Relationship

Please note whether to self, partner or both in brackets

Date of birth Dependant ☐ Yes ☐ No

Name

Relationship

Please note whether to self, partner or both in brackets

Date of birth Dependant ☐ Yes ☐ No

Name

Relationship

Please note whether to self, partner or both in brackets

Date of birth Dependant ☐ Yes ☐ No

Name

Relationship

Please note whether to self, partner or both in brackets

Date of birth Dependant ☐ Yes ☐ No

Income Details

	Self	Partner/Spouse
Occupation		
Type of employment	☐ Employed ☐ Self-employed ☐ Director ☐ Retired	☐ Employed ☐ Self-employed ☐ Director ☐ Retired
Employer		
Employer's address		
	Postcode	Postcode
National Insurance No.		
Expected Retirement age		
Income from employment	£	£
Income from investments	£	£
Income from pensions	State £	State £
	Employer £	Employer £
	Private £	Private £
Other income	£	£

Real Assets

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

Financial Assets

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

Protection Policies

Type of Policy	Maturity Date	Sum Assured	In Trust
		£	☐ Yes ☐ No
		£	☐ Yes ☐ No
		£	☐ Yes ☐ No
		£	☐ Yes ☐ No

Do you have any private medical insurance (PMI) ☐ Yes ☐ No

If yes, please supply renewal date

Are you considering private medical insurance (PMI) ☐ Yes ☐ No

Estate Planning

Do you have a Will in place? ☐ Yes ☐ No

When was your Will written?

Who are your beneficiaries?

Do you have Lasting Powers of Attorney in place? ☐ Yes ☐ No

Who are your attorneys?

What Trust arrangements do you have in place?

Are you expecting an inheritance in the near future? ☐ Yes ☐ No

Have you got Private Medical Insurance in place? ☐ Yes ☐ No

Liabilities

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

Estimated Expenditure

	Monthly	Annually
Rent / Mortgage	£	£
Loans / Credit Card	£	£
Housekeeping (food, cleaning etc)	£	£
Utilities	£	£
Motor Expenses (fuel, tax, insurance)	£	£
Insurances' & Policies	£	£
Entertainment	£	£
Other Expenditure	£	£
Total Estimated Expenditure	£	£

The Lifetime Focuser

Completing the Lifetime Focuser will help you to clarify your thoughts for your goals, plans and objectives for the coming years. Usually these will change over time so it is important that the actions you put in place are flexible enough to take account of these changes.

It may be that, at this stage you are unclear what it is you want to achieve, but please give each area some thought. As Financial planners, we need to understand what you want to achieve if we are to develop an effective financial plan and strategy.

Lifetime goals and plans

3 Year goals and plans

3 Month goals and plans

Financial Goals

In broad terms please note your financial goals as they stand at present:

Time Horizon for financial investments
How long will your assets be invested before you need to withdraw them?

Investment hurdle rate
What annual return do you need to achieve on average to be happy with your portfolio?

Income portfolio date
When will you require income from your portfolio?

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 dependent upon the accuracy of the information provided to you.

Signed

Date

Signed

Date

Once completed please save and send with any accompanying information you are happy to share to office@seymourfinancial.co.uk.

For security you may which to send this encrypted or password protected and let us know the password separately.

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