

# THE LIFETIME FOCUSER

## CLIENT PRE-MEETING QUESTIONNAIRE

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

We would be grateful if you could return the questionnaire 5 working days prior to your meeting.

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 third party organisation.

### PERSONAL DETAILS

	Self	Partner / Spouse
Title		
Surname		
Forenames		
Martial Status		
Smoker	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Male or female		
General state of health	good / some past problems	good / some past problems
Place of birth		
UK resident since		
UK resident for tax	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Intention of living abroad in future	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Date of birth		
Address		
Postcode		
Telephone	Home	
	Work	
	Car/Mobile/Other	
	Fax	
	E-mail	

### CHILDREN / DEPENDANTS

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

Name	Relationship Please note to self, partner or both in brackets	Date of birth	Dependant Y N

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


## INCOME DETAILS

	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	£	£

## 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	£	£	£
TESSA's	£	£	£
National Savings	£	£	£
PEP's	£	£	£
ISA's	£	£	£
Investment Bonds	£	£	£
Unit Trusts & Investment Trusts	£	£	£
Shares	£	£	£
Pension Funds	£	£	£
Total	£	£	£

## INSURANCE POLICIES

Type of Policy	Maturity Date	Sum Assured	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			

## ESTIMATED 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

When was your Will written?

Who are your Beneficiaries?

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?

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## PRIORITIES AND OBJECTIVES

Completing the lifetime focuser will help you to to clarify your thoughts for your goals, plans and objectives for the coming years. Usually these will change over time and 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 that you are unclear what it is that 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:**

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## INVESTMENT REQUIREMENTS

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

**Time scale for financial investments:**

How long will your assets be invested before you need to withdraw them?

**Investment return rate:**

What annual return do you need to achieve to be happy with your portfolio?

**Income portfolio date:**

When you will require income from your portfolio, if at all?

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## DECLARATION

The declaration 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 dependant upon the accuracy of the information provided to you.

Signed:.....

Signed:.....

Date:.....

Date:.....

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