



Personal Financial Review

If you wish for Chambers to provide you with a full advisory service, please complete the form below and post it to the address below, or fax it to **01225 428445**



All information received will be treated in the strictest confidence.

Chambers Independent Financial Advisers
27 Gay St
Bath
Avon
BA1 2PD

Telephone: **01225 428444**

E-mail: **info@chambers-astute-investor.co.uk**

About you

Title: Firstname(s): Surname:

Sex: Date of Birth:

E-mail Address:

Address:

Town:

Postcode:

Country:

Phone: Daytime Evenings Mobile

Occupation:

Employment: Employed Self Employed Company Director Retired

Marital Status: Married Divorced Widowed Single

Do you have any children?: Yes No

About your income

Earned Income (before tax): £ Paid by:

Pension Income (before tax): £ Investment Income (before tax): £

About your savings

Deposits: Bank/Building Society savings

TESSAs

National Savings

Guaranteed Bonds

Investments: Governments Stocks

Shares

About your savings (continued)

Investments:	Unit Trusts/Investment Trusts	£
	Personal Equity Plans (PEPs)	£
	Individual Savings Accounts (ISAs)	£
	Investment Bonds	£
Others: please specify:		
Regular Savings:	£	p.a.

About your home

Do you own a property? Yes No If yes, what is the approximate value: £

Do you have a mortgage: Yes No If yes, how much is outstanding? £

About your future income

Are you contributing to a pension? Yes No

If so what type? Employer's Personal AVC/FSAVC

Your financial objectives

Maximise Income Capital Growth Retirement Planning

Inheritance Tax Planning Offshore Investments Provision for Long Term Care

Other (please specify):

Do you have an existing financial advisor? Yes No

Please mark your attitude to investment risk on the following scale: Low Balanced High

Over what period? (years) 0-5 5-10 10+

Amount currently available for investment: £

How much do you want to save?

Lump Sum: £

Regular Saving: £ Per month Per annum

Where is it now? When is it available?

Signed:

Date: / /