

Client Surname

	Male Client	Female Client	Joint Assets
Client First Name			
UK Domicile	£	£	
Widowed/Divorced?	£	£	
Primary Property	£	£	
Other Property	£	£	
(Enter net values)			
Business Assets			
BPR qualified	£	£	
Non BPR qualified	£	£	
Nature of business			
Investments	£	£	£
Savings & Cash	£	£	
Personal Life Cover			
In trust	£	£	
Not in Trust or planned	£	£	
Pensions/SIPP			
In trust	£	£	
Other Pension 1	£	£	
Other Pension 2	£	£	
Other Pension 3	£	£	
Death in Service Value	£	£	

Family Make Up	Male Client's Children	Female Client's Children	Joint Children
Child 1 (first name)			
Child 2 (first name)			
Child 3 (first name)			
Child 4 (first name)			
Child 5 (first name)			

Primary Aims:

Special Points (such as foreign assets, gifting to children, expected inheritance)