

ASTUTE | 360

CONTACTS & ADVISERS

Profession	Name	Company	Contact Details

REAL ESTATE DETAILS

Do you own or rent the property you live in? Own Rent

If the property is owned, is it owned by You Spouse/Partner Jointly

If the property is jointly owned, is it Joint Tenancy Tenants in Common

What is the current value of the property?

What is the outstanding mortgage?

Do you own any other property in the UK or overseas? If so please provide details below.

EMPLOYMENT DETAILS

Are you employed or self employed? Employed Self Employed

If employed, please provide the name of the employer, annual salary and any Benefits In Kind you are receiving.

If self employed, please provide details of your profession, your accounting year end and profit/losses from the last accounting period.

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BUSINESS INTERESTS

Please provide details below of any business interests you may hold.

Business Name	Type of Interest (eg shares, loans etc)	Date of acquired interest	Amount of interest acquired	Cost of acquiring interest	Value of interest

DEPOSITS

Please provide details below of any deposits (bank, ISAs, premium bonds etc.) you may hold.

OTHER INVESTMENTS

Please provide details below of any other investments (investment trusts, stocks & shares, unit trusts) you may hold.

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CAPITAL DEPOSITS

Please provide details below of any business interests you may hold.

PENSIONS

Please provide details below of any pensions you may hold.

FOREIGN INCOME

Please provide details below of any foreign income and the amount of foreign tax deducted (if known).

OTHER ASSETS

Please provide details below of any other assets you own (including ownership and value).

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LOANS & OUTSTANDING DEBTS

Please provide details below of any loans or outstanding debts.

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LIFETIME GIFTS

Please provide details below of any Lifetime Gifts you have made.

Date	To whom	Description	Value	Interest retained

LIFE ASSURANCE

Please provide details below of any life assurance in force

Company	Policy No.	Life Assured	Term	Sum Assured	In Trust?

WILLS

Do you have a Will? Yes. Please provide a copy. Does it reflect your current wishes? Yes
 No No

OTHER INFORMATION

Please provide details below of any other information you wish to disclose.

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