

Financial planning

Financial Planning Questionnaire

Use this checklist to focus on the areas we can help. If you then fax or mail a copy of the checklist back to us, we can arrange to meet with you to discuss your goals and how we can help you achieve them.

Areas to consider	Need advice	Need advice in future	Already covered or not interested
Minimising my income tax liability			
Tax efficient savings, for the short or long term			
Building net worth through proven investment strategies			
Protecting my assets from bankruptcy			
Funding my children's education			
Potentially higher rewards from higher risk investments			
Raising finance			
Tax and NIC efficient remuneration and profit extraction			
Buying property – residential, investment or business			
Providing for my family if I die, or become incapacitated			
Providing for my business if unable to work			
Maximising savings in my final working years			
Maintaining my current standard of living in retirement			
Minimising tax liability of my estate			
Valuing of my business or other assets			
Transferring my business to my heirs			
Transferring other assets to my heirs			
Developing my estate plan as circumstances change			
Drafting my will tax efficiently			
Providing liquid assets to fund taxes on my estate			
Charitable giving			
Insurance – the right type, and the right amount of cover			

Your name: _____

Company: _____

Tel Number: _____

Email: _____

Fax Back on: **023 8026 9621**