

FINANCIAL ADVISER DETAILS

Company:

Name:

Email:

Is this report required by a specific date?:

PORTFOLIO DETAILS

Client Name:

Life Company? (If yes please state):

Via a Trust / Pension? (If yes please state):

Individual Savings Account (ISA)? Yes No (Please ensure the client signs the ISA declaration form provided with the requested proposal)

Please indicate currency and approximate value of investment: £ € \$ Value:

Please select which TAM portfolio you would like a proposal for (please select **one** only):

	PREMIER Minimum 200,000	FOCUS Maximum 200,000	FOCUS AUD	ETHICAL	SHARIA	PASSIVE
Liquidity	<input type="radio"/>					
Defensive	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cautious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balanced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventurous	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speculative	<input type="radio"/>					

Income requirement:

Adviser fee requirements: INITIAL FEE: _____ % ONGOING FEE: _____ %

Please include details of any existing holdings and/or any special instructions below.