



## FACT FIND - GENERAL INFORMATION

Please complete using block capitals and leave blank those sections that do not apply. Thank you.

	Client A	Client B
Full name (including Forename(s) and title).		
Date of birth		
Country of birth		
Marital status		
Date of marriage (if applicable)		
Occupation		
Correspondence address		
Home telephone number		
Work telephone number		
Mobile number		
Confidential e-mail		
<b>FAMILY DETAILS</b>		
Children (if any)	Client A	Client B
Children's name and date of birth		
Grandchildren (if any)	Client A	Client B
Grandchild's name and age		
Parents	Client A	Client B
Parent's name and date of births		
Parent's assets and any inheritance due		

GENERAL HEALTH DETAILS	Client A		Client B		
Are you in good health?	Please tick the appropriate box Yes                      No		Please tick the appropriate box Yes                      No		
If no, please give details					
Please give details of any disability					
APPROXIMATE VALUE OF COMBINED ASSETS (Please tick one of the following)					
Up to £100,000	£100,000 to £250,000	£250,000 to £500,000	£500,000 to £750,000	£750,000 to £1,000,000	Over £1,000,000
Are any of these assets located overseas?	Please tick the appropriate box Yes                      No		Please tick the appropriate box Yes                      No		
Have you ever lived overseas, or do you anticipate doing so in the future?	Please tick the appropriate box Yes                      No		Please tick the appropriate box Yes                      No		