

Blackden Financial



Independent Wealth Management

GENEVA - LAUSANNE - ZURICH

‘INTERNATIONAL PERSPECTIVE, INDEPENDENT ADVICE’

PRIVATE & CONFIDENTIAL

DATE

CLIENT(S)

TEL NO WORK _____

HOME _____

MOBILE _____

FAX _____

E-MAIL _____

ADDRESS _____

PERSONAL DETAILS

CLIENT 1 _____

CLIENT 2 _____

DATE OF BIRTH _____

DATE OF BIRTH _____

NATIONALITY _____

NATIONALITY _____

MARITAL STATUS _____

MARITAL STATUS _____

CHILDRENS NAMES

AGE

SCHOOL FEES CONT

EMPLOYERS CONT

1 _____

2 _____

3 _____

EMPLOYMENT INFORMATION

JOB TITLE – CLIENT 1 _____ EMPLOYER _____

SALARY _____ BONUS _____

JOB TITLE – CLIENT 2 _____ EMPLOYER _____

SALARY _____ BONUS _____

SALARY INCREASES _____

ESTIMATED MONTHLY SALARY SURPLUS _____

RESIDENCE PLANS

RESIDENCE OVERSEAS TO DATE: _____ RESIDENT IN PRESENT COUNTRY _____

POSSIBLE FUTURE MOVES:- WHERE _____ WHEN _____

PREFERRED / PLANNED COUNTRY OF RETIREMENT _____

PROPERTY

1 LOCATION _____ VALUE _____

MORTGAGE OUTSTANDING _____ REPAYMENTS _____ INCOME _____

2 LOCATION _____ VALUE _____

MORTGAGE OUTSTANDING _____ REPAYMENTS _____ INCOME _____

PLANNED PROPERTY PUCHASE _____

RENTED ACCOMODATION _____ COST _____

NOTES

ACCUMULATED CAPITAL/INVESTMENTS

SOURCE / ASSET TYPE

CASH DEPOSIT

AMOUNT

_____	_____
_____	_____
_____	_____
_____	_____

UNITISED INVESTMENTS, MUTUAL FUNDS, EQUITIES

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

OTHER INVESTMENTS

_____	_____
_____	_____
_____	_____

PENSION ARRANGEMENTS

CURRENT/COMPANY

EMPLOYERS RETIREMENT AGE _____ EARLY RETIREMENT CHARGE _____

PERSONAL CONTRIBUTIONS _____ EMPLOYERS CONTRIBUTIONS _____

ESTIMATED BENEFITS AT NORMAL RETIREMENT AGE _____

PRESERVED/DEFERRED BENEFITS

SCHEME 1 (CURRENT VALUE / DEFERRED ANNUAL PENSION) _____

SCHEME 2 (CURRENT VALUE / DEFERRED ANNUAL PENSION) _____

SCHEME 3 (CURRENT VALUE / DEFERRED ANNUAL PENSION) _____

STATE BENEFITS _____

DESIRED RETIREMENT AGE _____ DESIRED INCOME AT RETIREMENT _____

SHORTFALL _____

NOTES

INSURANCE

LIFE INSURANCE – PERSONAL

LIFE ASSURED _____ SUM ASSURED _____ TYPE _____ TERM _____

LIFE ASSURED _____ SUM ASSURED _____ TYPE _____ TERM _____

LIFE ASSURED _____ SUM ASSURED _____ TYPE _____ TERM _____

LIFE INSURANCE – EMPLOYER

LIFE ASSURED _____ SUM ASSURED _____

LIFE ASSURED _____ SUM ASSURED _____

MEDICAL INSURANCE

CRITICAL ILLNESS COVER

LIFE ASSURED _____ SUM ASSURED _____ TYPE _____ TERM _____

LIFE ASSURED _____ SUM ASSURED _____ TYPE _____ TERM _____

INCOME REPLACEMENT

BENEFITS _____ TERM _____ BENEFITS _____ TERM _____

ADDITIONAL INFORMATION/NOTES

FINANCIAL OBJECTIVES & PRIORITY

WHAT ARE YOUR PRIORITIES? LIST FROM 1 – 7 IN ORDER OF PRIORITY

RETIREMENT PLANNING _____

CAPITAL INVESTMENT PLANNING _____

REGULAR SAVINGS PLANNING _____

EDUCATION FEES PLANNING _____

LIFE ASSURANCE PLANNING _____

PROPERTY PURCHASE _____

ESTATE PLANNING / WILLS _____

SAVINGS/RETIREMENT/INVESTMENT OBJECTIVE(S)

TIME FRAME:

- 1. _____
- 2. _____
- 3. _____
- 4. _____

INVESTMENT RISK / REWARD RATIO



- 0 – No Risk
- 1 – Cautious Risk
- 2 – Balanced Risk
- 3 – Market Risk
- 4 – Adventurous Risk
- 5 – Speculative Risk

NB – Where a number of recommendations are made they may carry different risk ratings but overall they will aim to achieve an average level of risk as indicated above.

CURRENCY

Please indicate your base currency

CHF / EURO / STERLING / US DOLLAR / YEN / OTHER

DECLARATION

I/we confirm that the information provided by me/us in this questionnaire is accurate and understand that it will form the basis of any advice provided. I/we understand that advice given will be based therefore entirely on the completed sections of this questionnaire. I / we declare that I am / we are both legal & beneficial owners of all assets mentioned herein. All information provided will be treated as entirely confidential.

CLIENT 1

CLIENT 2

Signed _____

Date _____

NOTES