Lamont Pridmore

Personal Financial Review : Client Questionnaire

Savings and Investments

1. Are you happy with your investment returns?
2. Are you maximising your annual ISA allowances?
3. Are you using your annual Capital Gains Tax exemptions?
4. Are you maximising the tax-free annual personal allowances?
5. Do you require additional income?
6. Do you have a specific personal or financial goal in mind?

Financial Protection

1. Do you have sufficient life cover in place?
2. Are you concerned about the effect on your family if you were unable to continue working?
3. Are you concerned about the effect on your family if you were to die prematurely?
4. How would long-term illness affect you financially?

Pension and Retirement Planning

1. Have you started planning for your retirement?
2. When would you like to retire?
3. How much income do you think you will need in retirement?
4. What will your existing pension funds provide?

Wills and Inheritance Tax Planning

1. Do you know the value of your estate?
2. Do you know the potential amount of Inheritance Tax your family will have to pay?
3. Do you have a Will, and is the Will up to date?
4. Have you made any arrangements to reduce the potential Inheritance Tax liability?

Whichever of the above is a concern to you, speak to one of our Independent Financial Advisers, we can then arrange a meeting to discuss your individual requirements in full, including advising on the use of the right product or products for your needs.

For more information, please contact us on **0800 234 6978**

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