

# Money Plus

## PERSONAL REVIEW

The purpose of this questionnaire is to clarify your financial needs, and to assist us to advise you in relation to certain financial products.

### CLIENT DETAILS

	SELF	PARTNER
Name:		
Address:		
Home Telephone:		
Mobile:		
Email:		
Marital Status:		
Date of Birth:		
Sex:		
Smoker:		
Health:		

### DEPENDENTS

NAME	DATE OF BIRTH	RELATIONSHIP
1.		
2.		
3.		
4.		
5.		

### OCCUPATION AND INCOME

	SELF	PARTNER
Occupation		
Employment Status (Self-Employed/ Employee/Owner/ Director)		
Permanent / Contract		
PPS No		
Gross Annual Salary		
Net Monthly Income (from salary)		
Other Net Monthly Income (rent etc)		
Total Net Monthly Income		
Pension Scheme in Work	Yes [ ] No [ ]	Yes [ ] No [ ]

## REGULAR MONTHLY EXPENSES

	SELF	PARTNER	JOINT
Rent/Mortgage Repayments			
Loan Repayments/ Credit Card			
Regular Expenses (e.g. food, Utility bills, Household bills, Motor, Travel, Holidays, Mortgage Protection, Regular Savings, Pension Contribution, other expenses)			
<b>Total Monthly Outgoings</b>			

## FAMILY HOME & PROPERTY INVESTMENTS

ADDRESS	VALUE	MORTGAGE	REPAYMENT	TERM LEFT	RENTAL INCOME

## NON-MORTGAGE LOANS

SELF/PARTNER/JOINT	PURPOSE	OUTSTANDING AMOUNT	REPAYMENT	END DATE

## LIFE AND SERIOUS ILLNESS PROTECTION

SELF/PARTNER/ JOINT	POLICY NUMBER	PROVIDER	LIFE COVER AMT	SERIOUS ILLNESS AMT	END DATE

## INCOME PROTECTION

SELF/PARTNER	POLICY NUMBER	PROVIDER	ANNUAL BENEFIT	END DATE

## HEALTH INSURANCE

SELF/PARTNER/ JOINT	COMPANY	LEVEL OF COVER

## RETIREMENT PLANNING TO DATE

SELF/PARTNER	PENSION TYPE	PROVIDER	STATUS	NORMAL RETIREMENT AGE	ESTIMATED VALUE	CURRENT CONTRIBUTIONS

## INVESTMENTS / DEPOSITS / SAVINGS

SELF/PARTNER/JOINT	PRODUCT DESCRIPTION	COMPANY	CURRENT VALUE	NET INCOME (P.A)

## INVESTMENT RISK: PREFERENCE & CAPACITY

It is the policy of Money Plus to complete a specific investment risk questionnaire to assist in determining the most appropriate investment for each client. Before completing same please answer the following:

Outline your investment objectives - include term & consequences if not met:

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What is the likelihood of you requiring access to the fund before the end of the term?

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Have you an emergency fund in place (3-6 months income)? Please give details?

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Do you anticipate any changes in your income/ expenses/ asset/ liabilities? E.g. expected inheritance.

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How secure is your current income? In the event of a change to your financial circumstances, can you adjust your current lifestyle expenses?

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Have you got a Will? (Estate Planning)

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