

The Lifestyle Focus™

Completing the Lifestyle Focus™ will help you to clarify your thoughts for your goals, plans and objectives for the coming years. Usually these will change over time and so it is important that the actions you put in place are flexible enough to take account of these changes.

It may be that, at this stage that you are unclear what it is that you want to achieve, but please give each some thought. As Financial Planners, we need to understand what you want to achieve if we are to develop an effective financial plan and strategy.

Lifetime Goals & Plans:

3 Year Goals & Plans:

3 Month Goals & Plans:

Financial Goals

In broad terms please note your financial goals as they stand at present:
Time Horizon for financial investments: How long will your assets be invested before you need to withdraw them?
Investment hurdle rate: What annual return do you need to achieve on average to be happy with your portfolio?
Income portfolio date: When will you require income from your portfolio?

Declaration

The information contained in this document is correct to the best of our/my knowledge. I/We understand that the quality of any advice given will be dependant upon the accuracy of the information provided to you.
Signed: Signed:
Date: Date:.....

The Lifestyle Focus™ Pre-Meeting Client Questionnaire

Completion of this questionnaire will allow us to prepare for your meeting so that your meeting can be both productive and interesting. The more accurate your information, the more effective the meeting can be.

We would be grateful if you could return this questionnaire 5 working days prior to your meeting by post, email to info@kpfm.co.uk or Fax 01786 479245

By completing this information you will not be committed to using our service, and we will not be committed to working with you. All information is confidential and is not shared with any third party organisation.

Personal Details

	Self	Partner / Spouse
Title		
Surname		
Forenames		
Date of Birth		
Marital Status		
Smoker	Y / N	Y / N
Address		
Post Code		
Home Telephone No.		
Work Telephone No.		
Mobile Number		
Email Address		
Previous addresses (Last 3 years)		
Address		
Postcode		
Dates of entry/leaving		
Address		
Postcode		
Dates of entry/leaving		

Children

Full Name	Male/female	Date of Birth	Dependant?
	M/F		Y / N
	M/F		Y / N
	M/F		Y / N

Income Details

	Self	Partner / Spouse
Occupation		
Type of Employment	Employed <input type="checkbox"/> Self-Employed <input type="checkbox"/> Retired <input type="checkbox"/>	Employed <input type="checkbox"/> Self-Employed <input type="checkbox"/> Retired <input type="checkbox"/>
Employer		
Employers Address		
Employment start date		
National Insurance No.		
Income from Employment	£	£
Income from Investments	£	£
Income from Pensions	State £	State £
	Employer £	Employer £
	Private £	Private £
Other Income	£	£

Real Assets

Asset Class	Self	Partner / Spouse	Joint
Residential Address	£	£	£
Additional Properties	£	£	£
Business Assets	£	£	£
Total	£	£	£

Financial Assets

Asset Class	Self	Partner / Spouse	Joint
Bank & B/Soc Accounts	£	£	£
TESSA's	£	£	£
National Savings	£	£	£
PEP's	£	£	£
ISA's	£	£	£
Investment Bonds	£	£	£
Unit Trusts & Investment Trusts	£	£	£
Shares	£	£	£
Pension Funds	£	£	£
Total	£	£	£

Insurance

Type of Policy	Insurance Co Name	Life Assured	Maturity Date	Sum Assured	In Trust
		Self/Partner		£	Y / N
		Self/Partner		£	Y / N
		Self/Partner		£	Y / N
		Self/Partner		£	Y / N

Liabilities

	Mortgage	Secured Loans	Unsecured Loans	Credit cards
Name of Company				
Balance Outstanding	£	£	£	£
Monthly Payment	£	£	£	£
Interest Rate	%	%	%	
End Date				
Repayment Type				

Estimated Expenditure

	Monthly	Annually
Mortgage	£	£
Loans / Credit Card	£	£
House Keeping (Food, Cleaning)	£	£
Utilities	£	£
Motor Expenses (Fuel, Tax, Insurance)	£	£
Insurances' & Policies	£	£
Entertainment	£	£
Other	£	£
Total Estimated Expenditure	£	£

Wills & Trusts

When was your Will written?	Have you ever had any credit problems?
Who are your Beneficiaries?	Have you ever been in default or had a late payment with a mortgage or other loan or credit?
What changes do you want to make to your Will, if any?	Have you ever had any CCJ's?
What Trust arrangements do you have in place?	Have you ever been bankrupt?
Are you expecting any inheritance in the near future?	Have you ever entered into a trust arrangement or arrangement to pay?

Credit History