

Client Questionnaire



Strictly Private & Confidential

Client

For official use only

Client Reference

Investment Manager

Financial Planner

Section 2 Financial Details

Annual Income	You	Your Spouse/Partner
What is your gross income from employer?	£	£
What is your income from dividend/bond/partnership drawings?	£	£
What trust/investment/other income do you receive?	£	£
Is your monthly income adequate to cover your expenditure?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Asset Summary	You	Spouse/Partner	Joint
Excluding those managed by VWM Wealth, what is the approximate value of:			
Your Home (current market value)	£	£	£
Other Properties (current market value)	£	£	£
Bank/Building Society Accounts	£	£	£
National Savings/Premuim Bonds	£	£	£
Fixed Interest Investments	£	£	£
Equities/Unit and Investment Trusts	£	£	£
ISAs	£	£	£
Interests in Trusts	£	£	£
Other Investments (e.g. Insurance Bonds)	£	£	£
Please provide details for any of the above	<hr/> <hr/> <hr/> <hr/>		
If there are any assets held as tenants-in-common, please give details	<hr/> <hr/> <hr/> <hr/>		

Liabilities	You	Spouse/Partner	Joint
Mortgage	£	£	£
Repayment Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
Repayment Method	<input type="text"/>	<input type="text"/>	<input type="text"/>
Please advise us of any other financial commitments that you have/expect to have	<hr/> <hr/> <hr/> <hr/>		

Taxation Position	You	Your Spouse/Partner
We will assume your tax year end is 5th April unless stated otherwise	<input type="text"/>	<input type="text"/>
What is your marginal rate of income tax?	<input type="text"/> %	<input type="text"/> %
Can we assume that your Capital Gains Tax allowance is available to us each year unless we are specifically advised otherwise?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you ordinarily resident in the UK for tax purposes? If not, please state your country of residence	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="text"/>
Are you domiciled in the UK for tax purposes? If not, please state your country of domicile	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="text"/>

