

PRE-DEPARTURE QUESTIONNAIRE (EXITING UK)



Client name(s): _____

Address: _____

Source: _____

Important Notice to Clients:

In order for us to provide financial planning advice to you, we need to have a reasonable basis for that advice.

The information requested in this Client Profile is one of the tools we use to establish a basis for the advice we will provide.

It is therefore important for you to complete this document as accurately and fully as possible. Failure to do so could result in advice being provided that is not appropriate to your individual needs, circumstances and objectives.

For Office Use Only

Adviser Name: _____

Appointment Time/Date: _____

Location: _____