

M F S

INDEPENDENT FINANCIAL ADVISERS

To understand your Personal and Financial situation, it is essential that we be in possession of some basic facts and information about you and your family. It may not be always possible to arrange a meeting. Therefore this review form has been kept as simple as possible for you to complete and produce the basic information.

To provide detailed comprehensive, high quality independent advice, we will require more information. This will be obtained as appropriate e.g. over the phone.

Please return this form either by post or fax to:

**MFS Independent Financial Advisers
MFS House, 235 The Broadway, London SW19 1SD**

Fax: 020 8543 5377

*Please circle answers where applicable

	About you		About your Spouse/Partner	
Title				
First name				
Surname				
Sex	*Male	*Female	*Male	*Female
Date of birth				
E-mail				
House name/number				
Address				
Town				
County				
Postcode				
Daytime number				
Evening				
Mobile				
Occupation				
Employment	*Employed	*Self Employed	*Employed	*Self Employed
	*Company Director	*Retired	*Company Director	*Retired

Marital Status	*Married	*Single	*Married	*Single
	*Divorced	*Widowed	*Divorced	*Widowed
Do you have any children?	*YES *NO		*YES *NO	

About your home	
Do you own a property	*YES *NO
If yes, what is the value?	£
Do you have a mortgage?	*YES *NO
If yes, how much is outstanding?	£

About your savings		About you	About your Spouse/Partner
Deposits	Bank/Building Society savings	£	£
	TESSAs	£	£
	National Savings	£	£
	Guaranteed Bonds	£	£
Investments	Government Stocks (Gilts)	£	£
	Shares	£	£
	Unit Trusts/Investment Trusts	£	£
	Personal Equity Plans (PEPs)	£	£
	Individual Savings Account (ISAs)	£	£
	Investment Bonds	£	£
Others (please specify)		£	£
		£	£
		£	£
		£	£

Regular Savings	About you	About your Spouse/Partner
Regular savings	£ pa	£ pa

About your income	About you	About your Spouse/Partner
Earned Income (before tax)	£ pa	£ pa
Paid by:		
Pension Income (before tax)	£ pa	£ pa
Investment Income (before tax)	£ pa	£ pa

About your future Income	About you	About your Spouse/Partner
Are you contributing to a pension?	*YES *NO	*YES *NO
If so what type?	*Employer's	*Employer's
	*Personal	*Personal
	*AVC/FSAVC	*AVC/FSAVC

Your financial objectives	About you	About your Spouse/Partner
Maximise Income	*YES *NO	*YES *NO
Capital Growth	*YES *NO	*YES *NO
Retirement Planning	*YES *NO	*YES *NO
Inheritance Tax Planning	*YES *NO	*YES *NO
Offshore Investments	*YES *NO	*YES *NO
Provision for Long Term Care	*YES *NO	*YES *NO
Other (please specify)		

	About you	About your Spouse/Partner
Do you have an existing Financial Adviser?	*YES *NO	*YES *NO
If yes, what is their name?		

Please mark your attitude to Investment risk on the following scale	
About you	About your Spouse/Partner
Low <input type="checkbox"/> <input type="checkbox"/> Balanced <input type="checkbox"/> <input type="checkbox"/> High <input type="checkbox"/>	Low <input type="checkbox"/> <input type="checkbox"/> Balanced <input type="checkbox"/> <input type="checkbox"/> High <input type="checkbox"/>

Amount currently available for investment	About you	About your Spouse/Partner
How much do you want to save?	£	£
Lump Sum	£	£
Regular Saving	£	£
	*Per Month *Per Annum	*Per Month *Per Annum
Where is it now?		
When is it available?		

Over what period?	About you	About your Spouse/Partner
Number of years	*0-5 *5-10 *10+	*0-5 *5-10 *10+

Any other comments or information that may be useful to us

Information provided will be kept in the strictest confidence and access will be allowed only to the company's staff and financial advisers. MFS will keep you informed of investment opportunities as well as provide a newsletter on our website at <http://www.mfs-group.co.uk>
 MFS are registered under the Data Protection Act.