

**Confidential Client Mini Fact-Find**

	Client 1	Client 2	Child 1	Child 2	Child 3
Personal (Text)					
Full Name					
Address1					
Address2					
Town					
Postcode					
Date of Birth					
Marital Status					
Number of Children					
Number of Step Children					
Number of Grandchildren					
Email Address					
Phone (Landline)					
Phone (Mobile)					
General (Yes, No)					
Is there anyone dependant on you?					
Do you already have a Will?					
Do you already have a Lasting Power of Attorney?					
Do you own a business?					
Are you concerned by any of the following, (Please enter Yes/No)					
Home & savings lost to care home fees?					
Inheritance Tax / Capital Gains Tax?					
Inheritance lost to Creditors/bankruptcy?					
Inheritance lost to Divorce, Remarriage or Separation?					
Assets (Please enter figures only)					
Value of main property					
Other Properties total value					
Shares					
ISA's					
Bonds					
Bank & Building Society					
Business Assets					
Agricultural Assets					
Insurances (Please enter figures only)					
Life Assurance					
Whole Of Life					
Term Assurance					
Mortgage protection					
Critical Illness Cover only					
Pensions (Please enter figures only)					
Lump sum (pot)					
Death in Service					
Total Assets	£0				
Liabilities (Please enter figures only)					
Mortgage					
Loans/Finance/Credit card					
Total Liabilities	£0				
Overall Estate	£0				
Final Questions (Please enter Yes/No)					
Have you inherited in the last two years?					
Do you think you will inherit in the future?					
Do you know of any reason why you could enter care in the next seven years?					
Please enter the date you completed this form					
Please enter the date/time you'd like us to contact you?					

Please enter information into the boxes only. If there is nothing to put in, please put in a zero, or "None" to ensure nothing is missed.

Financials only need to be rough.

Once completed and saved, email back to
chris@rugbywills.co.uk

Thank you!

Any relevant information you'd like to add?