

Factfind Questionnaire

Personal info	Title, Forename(s), Surname			
	Date and place of Birth			
	National Insurance Number			
	Address Owned/rented? If owned please state date of purchase If rented please state date/length of agreement			
	Marital Status If married – Wife's name, date of birth, National Insurance Number			
	Date of marriage, separation, divorce or widowhood			
	Are you or partner claiming Child Benefit?		Yes	No
	Do you have any Student Loans?		Yes	No
	Telephone number(s) UK/Overseas			
	UTR Number (if known)			
	Employer Reference (if known)			
	E-mail Address Home/Work			
	Employment info	Current employers name and address		
Date of commencement				
UK tax paid - Yes		No	Overseas tax paid - Yes	No
Previous employers name and address				
Income sources	Date of cessation			
	UK tax paid – Yes	No	Overseas tax paid - Yes	No
	Bank/BS Accounts details			
	Dividends received			
	Rental Income received			
	Other			
	Pension payments	Pension Providers Name		
Pension policy number				
Date policy commenced				
Annual Premium received		Gross	Net	