

INITIAL ENQUIRY FORM

The information given on this form will be kept confidential whether or not you choose to become a client of Austen Birkett Financial Planning Ltd. Please complete as much as possible.

The purpose of this form is to reduce the amount of time information gathering at the initial meeting.

Before you supply any personal details to us via this form please read our [customer privacy notice document](#). This notice sets out how we will process your personal data in line with the General Data Protection Regulations.

Date:

Your Details				
	Self		Partner	
Title / Sex		M / F		M / F
Forename(s)				
Surname				
Known as				

Austen Birkett Financial Planning

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Authorised and regulated by the Financial Conduct Authority Reference 629542

Your Details				
		Self	Partner	
Date of Birth				
Marital Status				
Home Address (Complete 'Partner' details if different)				
Time at current address in years & months (If less than 3 years, detail all previous addresses for the last 3 years in Notes section)				
Home Telephone Number				
Mobile Number				
E-mail address				
Preferred method of contact				
Do you foresee any changes to your personal circumstances? (If 'Yes', give details in Notes section)		Yes / No	Yes / No	
Are you in good health?		Yes / No	Yes / No	
Do you have any medical conditions? (If 'Yes', give details in Notes section)		Yes / No	Yes / No	
Have you smoked in the last 12 months?		Yes / No	Yes / No	
Employment Status		Employed/Self-Employed/Retired/Other	Employed/Self-Employed/Retired/Other	
National Ins No. / UK Resident		Yes/No	Yes/No	
At what age do you intend to retire?				
Do you have any religious beliefs that would affect financial planning? (If 'Yes', give details in Notes section)		Yes / No	Yes / No	
Will you live abroad?		Yes / No	Yes / No	
Children and other Dependants (Partner / Grandchildren / Elderly dependants etc.)				
Do either of you have any dependants?			Yes / No	
	Name of Dependant	Date of Birth	Relationship	Financially dependent on self or partner?
1				
2				
3				

If more than three dependants, please write their details in the following Notes section

Notes

If any further information was requested previously, please detail it in this section. You can also write additional comments in this section if you wish.

Processing your personal data

Please tick to confirm that you have read the customer privacy notice and that you agree to Austen Birkett Financial Planning processing your personal information for the purposes set out in this form. We will not use the details you provide us in the contact page to market to you.