

# WEALTH MANAGEMENT FACT FIND QUESTIONNAIRE

Please make a note of the current values of your personal assets and liabilities. To save time, use estimates if you do not have recent professional valuation of assets. The idea is to arrive at a current estimated value of personal wealth.

Name:

Asset Description (don't include business assets)	Current Value	
Freehold Properties		
Stocks and Shares		
ISA's		
Bank Deposits		
Other Assets		

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Liabilities (don't include business debts)	Amounts owed	Monthly Outgoings
Mortgages		
Bank Loans		
Car Finance		
Bank Deposits		
Other Liabilities		
Other monthly outgoings – this information will indicate if you have any surplus income to invest each month:	Monthly costs	