

Financial circumstances and goals

In this section, we will ask questions about your financial situation, your plans for the future, and your goals. You may find it helpful to have information about your income and typical spending to hand. You don't have to provide exact figures; rough estimates are fine!

What is the value of your cash accounts?

Include current accounts, savings accounts, cash ISAs and similar accounts. Do not count cash held in investment portfolios or brokerage accounts.

[illegible]

What is the value of your investment accounts?

Include stocks and shares ISAs, general investment accounts and brokerage accounts, but not pensions.

[illegible]

What is the value of your pension accounts?

Only include defined contribution pensions and SPPs, not defined benefit or final salary pensions.

[illegible]

About your income

Enter information about your current income, and any significant payments you expect in the future. Please provide estimates that are after any taxes or deductions. You don't need to report every minor detail, just summarise your most important cashflows. Estimated or rounded values are fine!

Name	Annual Value	Start date	End date

How certain is this income?	Is this a guaranteed income?
<input type="radio"/> Very certain <input type="radio"/> Quite certain <input type="radio"/> Not certain	<input type="radio"/> Yes

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<input type="radio"/> Very certain <input type="radio"/> Quite certain <input type="radio"/> Not certain	<input type="radio"/> Yes

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How certain is this income?	Is this a guaranteed income?
<input type="radio"/> Very certain <input type="radio"/> Quite certain <input type="radio"/> Not certain	<input type="radio"/> Yes

About your spending

Enter information about your current ongoing expenditure (both essential and non-essential spending), and any important one-off commitments in the future. If you have goals for the future, you can report those here as well. You don't need to report every minor detail, just summarise your most important cashflows. Estimated or rounded values are fine!

Name	Annual Value	Start date	End date

How flexible is this expense?

☐ Very flexible ☐ Quite flexible ☐ Not flexible

Are you buying an asset?

☐ Yes Type: _____

How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

Name	Annual Value	Start date	End date

How flexible is this expense?

☐ Very flexible ☐ Quite flexible ☐ Not flexible

Are you buying an asset?

☐ Yes Type: _____

How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

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How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

Name	Annual Value	Start date	End date

How flexible is this expense?

☐ Very flexible ☐ Quite flexible ☐ Not flexible

Are you buying an asset?

☐ Yes Type: _____

How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

Name	Annual Value	Start date	End date

How flexible is this expense?

☐ Very flexible ☐ Quite flexible ☐ Not flexible

Are you buying an asset?

☐ Yes Type: _____

How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

Name	Annual Value	Start date	End date

How flexible is this expense?

☐ Very flexible ☐ Quite flexible ☐ Not flexible

Are you buying an asset?

☐ Yes Type: _____

How important is this expense?

☐ Very important ☐ Quite important ☐ Not important

What is the value of your non-investible assets?

Non-investible assets include the things you own that you couldn't (or wouldn't) easily sell to fund your expenditure. These include vehicles, properties, businesses, collectables, and more.

Name	Type	Value	Secured debt

Would you be willing to sell to fund future expenditure?

☐ Very willing ☐ Quite willing ☐ Not willing

Name	Type	Value	Secured debt

Would you be willing to sell to fund future expenditure?

☐ Very willing ☐ Quite willing ☐ Not willing

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Name	Type	Value	Secured debt

Would you be willing to sell to fund future expenditure?

☐ Very willing ☐ Quite willing ☐ Not willing

Name	Type	Value	Secured debt

Would you be willing to sell to fund future expenditure?

☐ Very willing ☐ Quite willing ☐ Not willing

Name	Type	Value	Secured debt

Would you be willing to sell to fund future expenditure?

☐ Very willing ☐ Quite willing ☐ Not willing

Do you have debts that haven't been reported in any other sections?

Include overdrafts, loans, credit cards and other debts. Do not include debts secured to investment accounts (i.e. margin lending) or other assets (e.g. mortgages).

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