Client Fact Find

RAVEN
WEALTH

Financial Services and Markets Act 2000

Independent Financial Advisers are required to have proper regard for a client's best interests in any advice given. They must therefore do their utmost to ensure that they are aware of your personal and financial circumstances so that their advice is the most suitable for your needs. The questions here have been specifically designed to help your adviser provide advice that meets your needs. If, for any reason, you decline to answer any or all of the questions or if you fail to provide true and accurate information to the best of your knowledge, the advice given subsequently may not be best advice, as it can only be based on the information provided.

Please provide a summary overview of your basic details and circumstances. We will collate further details as and when required during the advisory process.

Personal Details		
	Client 1	Client 2
Title		
First Name (s)		
Surname		
Address		
Previous Address (If you have moved in the last 3 years)		
Date of Birth		
Age		

Raven Wealth is a trading style of Eadon & Co Ltd which is registered in England and Wales, company number 11485349.
Registered office: 83 Ducie Street, Manchester M1 2JQ. Eadon & Co are authorised by the
Financial Conduct Authority with FCA number 816029.

Gender		
National Insurance Number		
Marital Status		
Are you currently in good health? If no, please provide details in notes section		
Employment Status		
Occupation		
What is your intended retirement age?		
UK domicile		
UK residency?		
Do you have any financial dependents?		

Family Dependents

Full Name	Date of Birth	Relationship	Dependent of

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Contact Details

	Client 1	Client 2
Address		
Previous Address (If you have moved in the last 3 years)		
Email		
Landline		
Mobile		
Work		
Preferred contact number		
I give my permission to be contacted	Yes ☐ No ☐	Yes ☐ No ☐

Income & Expenditure

	Client 1	Client 2
Basic Income (before deductions)	£	£
Other income (Rent / second job)	£	£
Monthly net income (Total)	£	£
Total Monthly expenditure	£	£
Please give detail below of any changes you expected in income or expenditure.		

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Assets

Please give details of all assets including investments, savings, and property etc.

Description	Owner	Initial Value	Asset value date	Current value
		£		£
		£		£
		£		£
		£		£
		£		£
			Total	£

Liabilities

Please give details of all assets including investments, savings, and property etc.

Description	Owner	Type	End Date	Current Debt
				£
				£
				£
				£
				£
			Total	£

Objectives

In your own words please detail your financial objectives for retirement. Please give details about your desired income level, liabilities, and investments at your projected retirement age.

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Pensions (Client 1)

Please give details of all assets including investments, savings, and property etc.

Provider	Type (DC / DB / Workplace)	Plan Number	Quote Expiry Date (DB Only)	Annual Pension on date of leaving (if known)	Current Value / CETV
				£	£
				£	£
				£	£
				£	£
				£	£
				Total	£

Pensions (Client 2)

Please give details of all assets including investments, savings, and property etc.

Provider	Type (DC / DB / Workplace)	Plan Number	Quote Expiry Date (DB Only)	Annual Pension on date of leaving (if known)	Current Value / CETV
				£	£
				£	£
				£	£
				£	£
				£	£
				Total	£

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Retirement Objectives

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When would you like to retire? (Age or date)		
How much do you think you will need to live off in retirement (after tax)?		
Do you think you will require any lump sums to clear final debts at retirement?		
Do you require the opportunity to vary your income according to your needs?		
Are you interested in knowing your retirement options and consolidating them into one easily manageable plan?		

Estate Planning

	Client 1	Client 2
Do you have a current will in place? What are your wishes?		
Does it reflect your current wishes / is it up to date?		
Do you hold or are you subject to any Trusts or Powers of Attorney?		

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Needs & Objectives

Please specify your 'initial' financial objectives by assigning a priority from 1 to 5 to the following need areas: (1=high priority; 5=no priority).

	1 - 5		1 - 5
Family Security		Maintaining standard of living in retirement	
Investment Planning		Reducing your tax burden	
Protection against critical illness		Mitigating Inheritance Tax liability	
Long term savings		Providing for your children's education	
Long Term Healthcare		Raising capital for specific objective	
Income protection		Paying off your mortgage	

Disclosure

PLEASE READ AND CHECK THIS ENTIRE FORM BEFORE SIGNING AND RETURNING TO ADVISER.

I/We confirm that the 'initial' basic information given and recorded on this form is correct and understand that it shall form the basis for any potential advice offered.

I/We also confirm we have received the Raven Wealth Client Disclosure Document and have read and understood the contents within.

	Client 1	Client 2
Signature	SIGN HERE	SIGN HERE
Date		
Adviser Signature		
Date		

Document reviewed 30/01/2022

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EADON & CO

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