

Mortgage and loans

	Amount	Monthly Payments	Lender	Date of Maturity	Balance outstanding	Endowment?
Mortgage	€	€ pm		/ /		
Car Loan	€	€ pm		/ /		
Other loans	€	€ pm		/ /		
Main residence value	€	Other property €		Mortgage cover €		Self only Both lives

Are you currently interested in buying a new home? Yes No

Savings and investments

Investments	Deposits €	Other investments €				
Regular savings	Contribution	Start Date	Maturity Date	Reason	Company	
Life Company	€ pm	/ /	/ /			
Other(An post, Bank, etc..)	€ pm	/ /	/ /			

Would you like to discuss ways of building a further cash sum for you and your children? Yes No

Establishing your financial needs

	You have	You need	Shortfall	Priority
Life Cover	- Self €	€	€	High/Med/Low
	- Partner €	€	€	High/Med/Low
Serious Illness	- Self €	€	€	High/Med/Low
	- Partner €	€	€	High/Med/Low
Pension	- Self €	€	€	High/Med/Low
	- Partner €	€	€	High/Med/Low
Regular Savings	€	€	€	High/Med/Low
Investments	€	€	€	High/Med/Low

Investments experience/attitude to risk

Agreed action

Next review date: / /

Action at next review:

Waiver option

I/We confirm that I/we do not wish to discuss my/our personal and financial details in connection with the attached application of a _____ plan. I/we accept that I/we have not received any investment advice in relation to this transaction, and that I/we have been made aware of the investment risks associated with the transaction on an execution-only basis.

Signature(s): _____ / / _____ / /

Declaration

I/we understand that the above recommendations is based on the information disclosed and that the actions agreed are to mu/our satisfaction

Signature(s): _____ / / _____ / /