**Financial Health Check**



 Trinity Holdings International 

Not sure of where to start or what to ask? Please take advantage of our

FREE FINANCIAL HEALTH CHECK to get started on the road to a personal financial plan.

**✓** All information is kept totally confidential.

**✓** This service is 100% Free.

**🗶** We will not use any information to contact you if you indicate you are not interested in future services.

**✓** The questions are designed to help us get a picture of your goals and your profile as an investor.

**✓** Please add as much extra information as you wish – the more we know the better we can help you.

**ABOUT YOU**➊

|  |  |
| --- | --- |
| Family Name |       |
| First Name(s) |       |
| Nationality  |       | Date of Birth: | dd | mm | yyyy | Do You Smoke? **Yes**: **No**:  |
|  |  |  |     |     |       |  |
| Email 1 🖰 |       | Email 2 🖰 |       |
| Work Tel 🕿 |       | Mobile 🕿 |       |
| Your Employer |       |

**ABOUT YOU**➋

|  |  |
| --- | --- |
| Family Name |       |
| First Name(s) |       |
| Nationality |       | Date of Birth: | dd | mm | yyyy |  Do You Smoke? **Yes**: **No**:  |
|  |  |  |     |     |       |  |
| Email 🖰 |       | Tel 🕿 |       |
| Your Employer |       |
| ➌ Children’s Age |       |

**YOUR GOALS**

 Please tick all the boxes that apply to you. ***I want to invest and save because:***

|  |  |
| --- | --- |
| I need a pension to retire on  |  |
| I need to pay for my children’s’ education  | **☐** |
| I want to buy property  |  |
| I want to supplement my regular income  |  |

|  |  |
| --- | --- |
| I want to invest a lump sum  |  |
| I want life assurance to protect my dependents  |  |
| I want critical illness cover for myself and my dependents   |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Which currency would you mostly be investing? | $US Dollars  |  £GB Pounds |  € Euros  | Other:       |

**WHAT IS YOUR INVESTMENT TIME FRAME?**

Please tick all the boxes that apply to you.

|  |  |
| --- | --- |
| I need long term investments: = 15+ years |  |
| I need medium to long term investments: = 10 ~ 15 years |  |
| I need short to medium term investments: = 5 ~ 10 years  |  |
| I need short term investments: = up to 5 years  |  |
| I need short to very short term investments: = less than 5 years |  |

**WHEN DO YOU WANT TO START INVESTING?**

|  |  |
| --- | --- |
| I’m ready NOW = I would like solutions from our meeting today |  |
| Within the next 1 to 2 months = I want you to contact me and arrange action and/or a meeting  |  |
| I would like advice now. Please follow up with me in:  |       |

 **YOUR CURRENT SITUATION**

*Please provide a summary of your current financial situation. Please specify the currency for each section.*

|  |  |  |
| --- | --- | --- |
| *Your current monthly salary* | ➊       | ➋       |
| *Property* | Total Value:       | Mortgage Owed:       |
| *Cash at Hand* (cash, bank and other savings,  investments maturing etc. |       |
| *Other Assets* |       |
| *Other Liabilities* |       |
| *Investments* | *Start Date* | *Finish Date* | *Premium* | *Current Value* |
|       |       |       |       |       |
|       |       |       |       |       |
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|       |       |       |       |       |

**HOW DO YOU FEEL ABOUT RISK?**

 Understanding how comfortable you are with risk is a key part of designing a financial plan

 *Investment basics: For* ***higher returns*** *on your investment you must often accept a* ***greater degree of risk***

 Think about this statement & mark the *RISK SCALE* with an **X** at a point that describes you *(use Spacebar to move)*

|  |
| --- |
|  **lower risk**  **medium risk** **higher risk** |  |

**WHAT PRODUCTS & SERVICES CAN WE HELP WITH?**

|  |  |
| --- | --- |
| alternative investments: property funds  |  |
| guaranteed income funds  |  |
| portfolio & asset management: discretionary |  |
| wills & probate, UK citizens  |  |
| inheritance tax planning, UK  |  |
| investing in fine art |  |

 Please tick all the boxes that apply to you.

|  |  |
| --- | --- |
| portable pension schemes: national & international  |  |
| life assurance solutions |  |
| critical illness cover  |  |
| mortgage advice  |  |
| education funding schemes  |  |
| saving & mutual schemes: short, medium & long term |  |

 ***Please Read This Section and Sign Here***: The information listed here is accurate to the best of my (our)

 knowledge and is provided to Trinity Holdings International for the purposes of my (our) Free Financial Advice.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  ➊ *Signed :* |       | ➋*Signed:* |       | Date: |    |    |       |

 ***Finished? Thank You. Please now save a copy using your name and:***

 *Email the Financial Health Check to****nigel@trinityhi.com***

*Completing online? Please type in your name and check the box to sign.*