

# *Annual Review Meeting File Note*

*Client Name*

*Present at the Meeting*

*Date of Meeting*

*Location*

*Your Current Circumstances:*

*Goals & Objectives (use 'Interesting Questions' to probe):*

*Strategic Review:*

*Advise Better*  
*Live Better*

# *Annual Review Meeting File Note*

## *Re-visiting Risk:*

Attitude to risk

Capacity for loss

Client Investment  
Experience/Knowledge

## *Investment Review:*

Portfolio Valuation

Investment Strategy

## *Debts & Loans:*

*Advise Better*  
*Live Better*

# *Annual Review Meeting File Note*

## *Taxation Update:*

Availability / Use of Allowances

Legislative changes

## *CGT considerations:*

## *Family protection requirements:*

## *IHT & Estate Planning:*

*Advise Better  
Live Better*

# *Annual Review Meeting File Note*

*Family Issues:*

*Other:*

*Strategy*

Agreed Actions

*Advise Better*  
*Live Better*

# *Annual Review Meeting File Note*

*Investments/Tax*

Agreed Actions

*Other Action Points:*

*Compliance paperwork signed / updated?*

*Report(s)/Suitability Required?*

*Further meeting needed?*

*Any timing considerations?*

*Advise Better*  
*Live Better*