

Top 10 Client Analysis

Client Name

Age

Marital Status

Children

Retired or working

Occupation

(If retired what was
their previous
occupation)

Clients Total Income

(from all sources)

Wages and salary

Bonuses

Dividends

Trusts/partnership Distributions

Other

Total net worth (£)

Assets invested with you (£)

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Top 10 Client Analysis

Other Potential Assets (£)

(Not invested with you)

Property Assets (£)

Wages and salary

Bonuses

Dividends

Services Purchased

(Tick all that apply)

Investments

Pensions

Life Insurance

General Insurance

Retirement Planning

IHT and Estate Planning

Tax Strategies

Referrals to other professionals

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