

## James Hay iSIPP *Enquiry request*

<b>Consultant</b>	
<b>Contact details</b>	Tel:
	Email:
Firm	

<b>Case name</b>
Primary objective
Secondary objective

Client 1		Client 2	
Age		Age	
Marital status		Marital status	
Annual income		Annual income	
Tax status		Tax status	
Estimated retirement age		Estimated retirement age	

Assets to be managed			
	£	Risk	Objective
Personal assets			
ISAs			
Pensions			
Trusts			
Offshore bonds			
<b>Total</b>			

<b>Source of funds</b>
------------------------

Smith & Williamson Investment Management Limited is authorised and regulated by the Financial Services Authority.

## *Other assets held*

Other investment assets	Client 1	Joint	Client 2
Cash			
Personal assets			
ISAs			
Pensions			
Trusts			
Offshore bonds			
Endowments			

Non-investment assets			
Principal residence			
Other properties			
Liabilities/mortgages			
Business interests			
Chattels			
Other			

Smith & Williamson Investment Management Limited is authorised and regulated by the Financial Services Authority.