**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* |
|  | |  | | |  | |  | |  |
|  | |  | | |  | |  | |  |
|  | |  | | |  | |  | |  |
|  | |  | | |  | |  | |  |
|  | |  | | |  | |  | |  |

**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***](mailto:nigel@trinityhi.com?subject=Financial%20Health%20Check)

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