

FINANCIAL PLANNING OBJECTIVES/ PRIORITIES


- 1. To transfer all his small pension pots to a QROPS
- 2. _____
- 3. _____

ADDITIONAL DEVERE GROUP SERVICES


WILLS CURRENCY EXCHANGE

ADDITIONAL INFORMATION

I/We confirm that the information contained in this fact find is accurate as of the date below and has been properly recorded. I/We are aware that the information provided will be used by my/our financial adviser to enable him/her to recommend financial products that meet my/our personal profile. Therefore any information not disclosed may result in an inaccurate assessment.

Signed:  Date: 26/5/15

Signed: _____ Date: 1 1

deVere Consultant:  Date: 26/5/15

**Received
as Original**

INTRODUCTIONS

- 1 _____
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