

Investment Questionnaire

A. Personal details

Full name

Email

Address

Postcode

Daytime
Tel.

Evening
Tel.

Mobile
Tel.

Date of
birth

NI number

Country of
birth

Marital
status

Country of
residence

Employment
status

B. Proposed investment

Which Simply EQ account(s) are you interested in?

Individual Savings Account (ISA)

Pension (SIPP)

General Investment Account (GIA)

Lump sum
amount:

Monthly
amount:

Have you already invested
in an ISA this tax year?

Yes

No

If yes, how
much?

At what age do you
plan to retire?

Do you want to transfer an existing ISA or pension over to Simply EQ?

Yes

No

If yes, then we'll need some additional details from you:

ISA transfers – please fill out Form S2

Pension transfers – please fill out Form S3

C. Financial snapshot

Monthly income

Monthly salary
(before tax):

Any other income
(monthly):

Is your income secure? Yes No

Savings and investments

Total savings and investments
accessible within one month:

(Including your proposed investment with Simply EQ)

Any other savings
and investments:

Pension

Do you currently
have a pension? Yes No

Current value:

Have you already taken any
cash or other benefits
from your pension? Yes No

Monthly expenses

Essential expenses:
e.g. mortgage, rent, bills

Non-essential expenses:
e.g. leisure, clothing, holidays

Do you have any
financial dependents? Yes No

Debt

Overdrafts, outstanding
credit card balances:

Any other loans:

Mortgage

Do you have a mortgage? Yes No

Outstanding mortgage
balance:

Is your mortgage
interest only? Yes No

D. Investment strategy

Simply EQ offers a choice of 3 different investment strategies. Please indicate your choice below:

Best Ideas

Low Cost

Positive Impact

For more information please visit www.simplyeq.com or give the Simply EQ team a call on 020 7488 7171

Please print, sign and return this form to:

Simply EQ, Centennium House, 100 LowerThames Street, London EC3R 6DL

Print name:

Signature:

Date:

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