Investec
Wealth & Investment

Vision INDEPENDENT FINANCIAL PLANNING

Client Investment Recommendation Request

I understand that Investec Wealth & Investment will create their Client Investment Recommendations, including their suitability statement, based upon the below information for my client(s), including the proposed mandate which I have deemed as suitable for their specific circumstances and needs using the current Know Your Client (KYC), Attitude to Risk and Capacity for Loss information held for the below client.

Client Details

Full Client(s) Name(s)

Client Background & Circumstances
(Optional: to enable IW&I to personalise the report and show knowledge of the client's needs and objectives within the recommendation)

Residential Address

POSTCODE:

Date(s) of birth

Personal Details
(Optional: e.g. dependents, employment status or occupation, N.I No. etc.)

Investment Details

Amount of Investment: Cash

Stock

Source(s) of funds
(i.e. where currently held)

Any other existing funds to consider
(e.g. Cash, Investments, Pension Transfers)

Type of Account (e.g. Personal, ISA, Trust, Pension, Offshore Bond, Company, or Charity)

Name of Product Provider
(e.g. Life Co re Pensions/Offshore Bond)

Level of Portfolio Risk:
(Please tick as appropriate)
Low ☐ Low-Medium ☐ Medium ☐ Medium-High ☐ High ☐

Investment Objective:
(Please tick as appropriate)
Income ☐ Income/Capital Growth (Balanced) ☐ Capital Growth ☐

Time Horizon
(Please tick as appropriate)
1-5 years ☐ 5 to 10 years ☐ 10 years plus ☐

Defined Mandate
(e.g. asset allocation or asset class)

Specific Client needs or requirements
(e.g. known capital expenditure or income)

Any Client preferences or exclusions?

Any other relevant information
(e.g. a current valuation or statement)

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Adviser Details & Adviser Agreed Remuneration (AAR)

Adviser Name	
Adviser Firm	
Non-Recurring AAR: £ or % (including any VAT that might be applicable)	
Recurring AAR: £ or % Per Annum (including any VAT that might be applicable)	
Vision IFP	
Castle	
Total (including any VAT that might be applicable)	

Bath	01225 341580	**Edinburgh**	0131 226 5000	**Liverpool**	0151 227 2030
Belfast	02890 321002	**Exeter**	01392 204404	**London**	020 7597 1234
Birmingham	0121 232 0700	**Glasgow**	0141 333 9323	**Manchester**	0161 832 6868
Bournemouth	01202 208100	**Guildford**	01483 304707	**Reigate**	01737 224223
Cheltenham	01242 514756	**Leeds**	0113 245 4488	**Sheffield**	0114 275 5100

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