

Product details

Investment Bonds

Please note we use the Synaptic research tool which takes into consideration the financial strength of the provider, features of the product, charges, fund performance and fund volatility.

Enter n/a where field is not applicable.

Investment amount £ _____

Ownership Single life 1 [] Single life 2 [] Joint life []

Other ownership _____

Withdrawal details _____

Withdrawal frequency Monthly [] Quarterly [] Annually [] Not applicable []

Capital protection Yes [] No []

Commission _____

IHT Trust arrangement? _____

Notes for paraplanner

If you have specific requirements please provide as much information here to assist your paraplanner. For example, if you are happy to use the asset allocation of the risk profiler 1-10 is there a provider in your opinion which you feel offers the most suitable fund selection, internal funds, multi-manager funds, specific funds etc.

IFA information. *Please complete on all pages to ensure we process your quote correctly.*

Name _____

Job Ref _____ Contact Tel. _____

Appendix - Investment risk scale

Examples: 1 = Cautious and 10 = Adventurous

Risk Rating	Asset Allocation Example	
1	Cash 100%	
2	Cash 44% UK Corporate Bonds 5% International Corporate Bonds 5% UK Gilts 27% UK Equities 5%	European Equities 2% North American Equities 3% Property 20%
3	Cash 5% UK Corporate Bonds 20% International Corporate Bonds 15% UK Gilts 25% UK Equities 10%	European Equities 2% North American Equities 3% Property 20%
4	Cash 5% UK Corporate Bonds 33% UK Equities 27%	European Equities 3% North American Equities 10% Japan Equities 3% Property 19%
5	Cash 5% UK Corporate Bonds 22% UK Equities 29%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 3% Emerging Market Equities 5% Property 13%
6	UK Corporate Bonds 16% UK Equities 43%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 5% Emerging Market Equities 5% Property 8%
7	UK Corporate Bonds 8% UK Equities 50%	European Equities 8% North American Equities 10% Japan Equities 5% Asia ex-Japan Equities 7% Emerging Market Equities 10% Property 2%
8	UK Equities 57%	European Equities 5% North American Equities 8% Japan Equities 5% Asia ex-Japan Equities 10% Emerging Market Equities 15%
9	UK Equities 30%	European Equities 5% North American Equities 5% Asia ex-Japan Equities 30% Emerging Market Equities 30%
10	UK Equities 5%	Asia ex-Japan Equities 50% Emerging Market Equities 45%

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