

STATEMENT OF MEANS

CLIENT 1

CLIENT 2

Full Name(s)

Address

Post Code

Occupation(s)

Employer(s)

Date(s) of birth

Telephone Number

Email Address

What Passport(s) you hold?

Country of residence

ANNUAL INCOME

Gross Salaries (Please detail any guaranteed bonuses separately)

CLIENT 1 ●

£

CLIENT 2 ●

£

Add

Other Annual Income (Please detail e.g. rentals, interest, dividend, fees etc.)

CLIENT 1 ●

£

CLIENT 2 ●

£

Total Annual Income

£

ASSETS AND LIABILITIES IN DETAIL

ASSETS	LIABILITIES
<p>PROPERTIES (Please detail address, valuation amount and date) If more than 2 properties, please complete the portfolio template.</p> <p style="text-align: right;">£</p>	<p>PROPERTY LOANS (Please detail amount outstanding, name of lender and final repayment date)</p> <p style="text-align: right;">£</p>
<p>LIFE POLICIES (Please detail company, surrender value and maturity date)</p> <p style="text-align: right;">£</p>	<p>OTHER BANK/FINANCE COMPANY LOANS (Please detail amount outstanding, name of lender and final repayment date)</p> <p style="text-align: right;">£</p>
<p>INVESTMENTS (Please detail company, type of investment and current valuation)</p> <p style="text-align: right;">£</p>	<p>GUARANTEE OBLIGATIONS (Please provide details)</p> <p style="text-align: right;">£</p>
<p>CASH BALANCES (Please detail company, amount and maturity date if applicable)</p> <p style="text-align: right;">£</p>	<p>OTHERS (Please provide details)</p> <p style="text-align: right;">£</p>
<p>OTHER ASSETS (Please give details)</p> <p style="text-align: right;">£</p>	
<p>ASSETS – TOTAL VALUE £ _____</p> <hr/> <p>Total Assets £ _____</p> <p>Less</p> <p>Total Liabilities £ _____</p> <hr/> <p>NET MEANS £ _____</p>	<p>LIABILITIES - TOTAL VALUE £ _____</p> <hr/>