

Please note that our service is exclusive to those with a minimum of €350,000 of "liquid" assets.

*i* Good decisions are based on good information, thus quality information is required to guide you properly

Personal details		You		Your par	tner		
Full name							
Maiden name							
Primary address							
i Is your partner's address the same a	s yours? Yes						
Telephone							
Mobile							
Email address							
Date of birth - DD/MM/YYYY		Age:			Age:		
Nationality, if other please specify		British Oth	er	British	British Other		
Country of residence		France OUK	Other	France UK Other			
Marital status		Please select		Please sel	ect		
Your country of residence 2 years fo	llowing marriage, if o	ther please specify	France UK Other				
Have you altered your marriage regi	me in France?	Yes No If yes, select which;					
Are you in good health?		Yes No		Yes	○ No		
About your children							
Children	Yours Part	ners O Together	Yours Partners 7	Together	Yours Partners Together		
Full name							
Age	Livir	ng with us Yes	Living with us	Yes	Living with us Yes		
Nationality / Country of residence		<u> </u>	8		· ·		
Marital status	Please select		Please select		Please select		
Age of their children	1. 2.	3. 4.	1. 2. 3.	4.	1. 2. 3. 4.		
Children cont	Yours Part	eners C Together	Yours Partners	Together	Yours Partners Together		
Full name							
Age	Livir	ng with us Yes	Living with us	Yes	Living with us Yes		
Nationality / Country of residence							
Marital status	Please select		Please select		Please select		
Age of their children	1. 2.	3. 4.	1. 2. 3.	4.	1. 2. 3. 4.		
Children cont	Yours Part	ners Together	Yours Partners 7	Together	Yours Partners Together		
Full name							
Age	Livir	ng with us Yes	Living with us	Yes	Living with us Yes		
Nationality / Country of residence							
Marital status	Please select		Please select		Please select		
Age of their children	1. 2.	3. 4.	1. 2. 3.	4.	1. 2. 3. 4.		

Residency position Y			You Your partner						
When did you / will you arrive in France?									
How long do you intend to remain in France? In years		1-5	<u></u>	Over 10 Indefinitely	1-5	5-10	Over 10	Indefinitely	
Have you completed a French Tax return?  If yes, please provide a copy of the last return		Yes	○ No	If yes what year did you co	omplete you	r first retur	rn?		
Future address If you are moving, please offer or the region that you are mov									
i Is your partner's address the	e same as yours? Yes								
Health service		You			Your partner				
Are you registered with the I	French health service?	Yes No			Yes	Yes No			
How are you accessing the ho	ealth service?	Please select			Please select				
Professional situation		You			Your partner				
What is your current status?		Please sea	lect		Please select				
Current job title (last job title	e if retired)								
Do you intend to work in Fra If yes please provide details	ance?	Yes	○ No		Yes No				
<i>i</i> Grey boxes do not need to	to be completed.	Please se	lect a curi	rency symbol or enter your ow	/n.	<i>i</i> Please	e select appro	priate options.	
Assets Tick if to be	sold Purchase Date Cur	rent valu	e	Loan or mortgage	Value	Ow	nership	Method	
UK home									
UK home contents									
French home									
French home contents									
Investment property									
Investment property address	l					ı		1	
Investment property contents									
Car									
Car									
Boat									
Caravan									
Other assets									
Other assets									
i If possible, please provide a copy of your French property purchase.  i The "Tontine Clause" is also known as a "Clause d'accroissement."									
If an SCI has been used, please provide ownership details and percentages.  If purchasing a new property, what is your budget?									
Life assurance arrangeme	ents		You	1		our part	ner		
Do you have any life assuran		provide deta					No		
Name of plan or product				~		<u> </u>			
Type of plan e.g. endowment									
Start date / Termination date	2								
Sum assured / Death benefit									
How much life assurance each	h								

Existing bank, building soc	iety accounts and in	vestments -	- NOT pension	s					
Name of financial institution		type / name	pe / name   Location - Please select or enter custom			alue		Ownership - Please selec	
YOUR - Annual income an	d expenditure - Plea	ase list incor	ne from pension	ıs, salary and e	any other	source			
Source		Annual income		Pa	Paid		on indexed	Civil Serv	vice / Military
				Gross	O Ne	t Yes	○ No	Yes	○ No
				Gross	O Ne	t Yes	○ No	○ Yes	○ No
				Gross	O Ne	t Yes	○ No	○ Yes	○ No
				Gross	O Ne	t Yes	○ No	C Yes	○ No
YOUR PARTNER'S - Ann	ual income and exp	enditure - <i>P</i>	Please list incon	ne from pension	ns. salarv	and any othe	r source		
Source	•		ual income		aid		on indexed		
				Gross	○ Ne	t Yes	○ No	_	
				Gross	○ Ne	t Yes	○ No	_	
				Gross	○ Ne	t Yes	○ No	_	
				Gross	○ Ne	t Yes	○ No	_	
NVI ( ) NVICE	1. 0							_	
What is your required NET an	nual income?							_	
Liabilities		You				Your par	tner		
Do you have any other liabilities?		s O No			Yes	○ No			
If yes, please provide details									
Will & testament and trust	S	You				Your par			
Have you made a Will?				Yes No					
If yes, in which countries?						Other			
Do you have any trusts?		Yes				Yes	○ No		
If you have completed a French to Indicate your inheritance wish		se provide cop	pies						
(Who you wish to benefit): Please select appropriate option									
sereer uppropriate option									

		ch as personal pension, emp paying into. Pensions you are			
Type of scheme	Provider	Monthly payment	Retirement age	Current value	Projected pension
YOUR PARTNER	A'S pension arrangement	s			
Type of scheme	Provider	Monthly payment	ment Retirement age Current value		Projected pension
Your mutual object	etives				
What are your object	tives for any regular saving	s or capital?	Notes (o		Capital growth Other
•		our medium / long term plannin ne improvements, extensions, ma			
If yes, please provide	details and estimated costs	:			
What is your inves	stment risk profile? - See	details described below - Ple	ease tick one or mo	ore of the boxes If you	wish feel free to specify a percentage.
○ HIGH Risk	%	MEDIUM Risk	%	Risk Ave	rse %
level of risk in relation that such an approas specialist sectors an may be highly volacertain high risk in realisable, as there meals of such investments.	you are willing to accept a control your portfolio. You reach may include investment d products whose performatile. You also appreciate vestments may not be reach ay not be a ready market for ents and that access to reliativestments may be restricted.	term investments, you based approach which equity based investment You are prepared to ac dily in the value of your potential for good mediable	a will accept a brincludes a proportion of the cents (stocks and shocept a degree of volucapital in return for	oadly taken to m risk and are in underlying va of capital and that this may earned on you returns from down, and w	sk at all is impossible, however, this is ean you are cautious and dislike ntolerant of volatility with regards to the lue of your capital. You prefer security d predictable investments. You accept result in low rates of return being ar portfolio. You also accept that interest deposit based investments move up and then compared to the rate of inflation a poor real return.
Other information	- Please use this space to	offer any other information th	at may be pertinen	t to your situation	
Miscellaneous - Ho	ow did you hear about KE.	NTINGTONS?			
Your signature an	d date - If you are comple	ting this on screen your signat	ure is not necessar	y	
Date	Your signature		Date	Your partner'	s signature
	Please note that our	service is exclusive to thos	e with a minimus	m of €350,000 of <u>"lic</u>	quid" assets.

# KENTINGTONS PRIVACY POLICY

We, at Kentingtons, take the privacy and security of our client's and contact's information very seriously. This document is concerning information which we may hold about you, explaining its purpose and your legal rights in relation to it.

#### WHAT INFORMATION DO WE COLLECT?

We collect and process personal information. This information lets us know the specifics of who you are, as we are obliged to do by our regulator. Personal information is requested when you enquire about a service offered by us and send us feedback. This information will include, but is not limited to, your name, address, email address, telephone number(s) and our services about which you have enquired.

## DO KENTINGTONS SHARE INFORMATION?

We share personal information as set out below:

- By transfer to third party agents, which perform certain functions on behalf of Kentingtons. These parties only have access to such information as necessary to perform their functions.
- Where we have a legal obligation to do so.

#### USE OF PERSONAL DATA

We collect data for use in the normal course of our business. We may use contact details that you provide to us to inform you of relevant opportunities, developments and events, unless you decide to opt out. Any information that you offer us will be used only for its intended purpose and we shall take all reasonable steps to ensure that the data held is adequate, relevant and that no more personal data is processed than is necessary having regard to the purposes of the processing.

## HOW DO WE PROTECT YOUR INFORMATION?

Collection of information - We will only obtain personal data from you for a specified and lawful purpose.

Security - We shall take all reasonable steps to protect your personal information from loss, misuse, unauthorised access, disclosure, alteration or destruction.

Accuracy - We will endeavour to maintain accurate records about our clients at all times. Clients can assist us in doing this by informing us of any changes in status, address, investment options or any other relevant information.

Retention of data - When requested we will delete personal information from current operational systems where required. We may need to continue to hold some details about you for legal and regulatory purposes.

Policy changes - If it is necessary to disclose any of your personal information in a way that is inconsistent with this policy, we will post notice of the proposed change or advise you directly.

### YOUR RIGHTS

You may request via email to info@kentingtons.com, or post to Kentingtons, 7 Place du Général de Gaulle, 83690 Villecroze, FRANCE a summary of personal information we retain concerning you. You may request via email or regular mail that we amend any inaccuracies, modify, remove any personal information we retain relating to you.

Where denial of retention (such as by selecting "No" below") or removal of data conflicts with our legal obligations as authorised and regulated advisers, we may be forced to withdraw our services from you.

I declare that I give Kentin	gtons my consent to hole	I relevant data in accordance with	the above: No Ye
Signed:	Date:	Signed:	Date: