

# KENTINGTONS

**TAX & INVESTMENT CONSULTANTS**

## CONFIDENTIAL QUESTIONNAIRE

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 partner
<b>Full name</b>		
<b>Maiden name</b>		
<b>Primary address</b>		
<b>i</b> Is your partner's address the same as yours? <input type="checkbox"/> Yes		
<b>Telephone</b>		
<b>Mobile</b>		
<b>Email address</b>		
<b>Date of birth - DD/MM/YYYY</b>	<i>Age:</i>	<i>Age:</i>
<b>Nationality, if other please specify</b>	<input type="radio"/> British <input type="radio"/> Other	<input type="radio"/> British <input type="radio"/> Other
<b>Country of residence</b>	<input type="radio"/> France <input type="radio"/> UK <input type="radio"/> Other	<input type="radio"/> France <input type="radio"/> UK <input type="radio"/> Other
<b>Marital status</b>	<i>Please select</i>	<i>Please select</i> <span style="float: right;">Marriage date</span>
<b>Your country of residence 2 years following marriage, if other please specify</b>	<input type="radio"/> France <input type="radio"/> UK <input type="radio"/> Other	
<b>Have you altered your marriage regime in France?</b>	<input type="radio"/> Yes <input type="radio"/> No <span style="margin-left: 20px;"><i>If yes, select which;</i></span>	
<b>Are you in good health?</b>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

About your children												
<b>Children</b>	<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together			<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				
<b>Full name</b>												
<b>Age</b>	Living with us <input type="checkbox"/> Yes			Living with us <input type="checkbox"/> Yes				Living with us <input type="checkbox"/> Yes				
<b>Nationality / Country of residence</b>												
<b>Marital status</b>	<i>Please select</i>			<i>Please select</i>				<i>Please select</i>				
<b>Age of their children</b>	1.	2.	3.	4.	1.	2.	3.	4.	1.	2.	3.	4.
<b>Children cont</b>	<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together			<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				
<b>Full name</b>												
<b>Age</b>	Living with us <input type="checkbox"/> Yes			Living with us <input type="checkbox"/> Yes				Living with us <input type="checkbox"/> Yes				
<b>Nationality / Country of residence</b>												
<b>Marital status</b>	<i>Please select</i>			<i>Please select</i>				<i>Please select</i>				
<b>Age of their children</b>	1.	2.	3.	4.	1.	2.	3.	4.	1.	2.	3.	4.
<b>Children cont</b>	<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together			<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				<input type="radio"/> Yours <input type="radio"/> Partners <input type="radio"/> Together				
<b>Full name</b>												
<b>Age</b>	Living with us <input type="checkbox"/> Yes			Living with us <input type="checkbox"/> Yes				Living with us <input type="checkbox"/> Yes				
<b>Nationality / Country of residence</b>												
<b>Marital status</b>	<i>Please select</i>			<i>Please select</i>				<i>Please select</i>				
<b>Age of their children</b>	1.	2.	3.	4.	1.	2.	3.	4.	1.	2.	3.	4.

Residency position	You	Your partner
When did you / will you arrive in France?		
How long do you intend to remain in France? <i>In years</i>	<input type="radio"/> 1-5 <input type="radio"/> 5-10 <input type="radio"/> Over 10 <input type="radio"/> Indefinitely	<input type="radio"/> 1-5 <input type="radio"/> 5-10 <input type="radio"/> Over 10 <input type="radio"/> Indefinitely
<b>Have you completed a French Tax return?</b> <i>If yes, please provide a copy of the last return</i> _____	<input type="radio"/> Yes <input type="radio"/> No <i>If yes what year did you complete your first return?</i> _____	
<b>Future address</b> <i>If you are moving, please offer details of your future address or the region that you are moving to</i>		
<i>i</i> Is your partner's address the same as yours? <input type="checkbox"/> Yes		

Health service	You	Your partner
Are you registered with the French health service?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
How are you accessing the health service?	<i>Please select</i>	<i>Please select</i>

Professional situation	You	Your partner
What is your current status?	<i>Please select</i>	<i>Please select</i>
Current job title <i>(last job title if retired)</i>		
<b>Do you intend to work in France?</b> <i>If yes please provide details</i> _____	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

*i* Grey boxes do not need to be completed.      *i* Please select a currency symbol or enter your own.      *i* Please select appropriate options.

Assets	Tick if to be sold	Purchase Date	Current value	Loan or mortgage	Value	Ownership	Method
UK home	<input type="checkbox"/>		Currency	Currency			
UK home contents	<input type="checkbox"/>		Currency				
French home	<input type="checkbox"/>		Currency	Currency			
French home contents	<input type="checkbox"/>		Currency				
Investment property	<input type="checkbox"/>		Currency	Currency			
Investment property address							
Investment property contents	<input type="checkbox"/>		Currency				
Car	<input type="checkbox"/>		Currency	Currency			
Car	<input type="checkbox"/>		Currency	Currency			
Boat	<input type="checkbox"/>		Currency	Currency			
Caravan	<input type="checkbox"/>		Currency	Currency			
Other assets	<input type="checkbox"/>		Currency	Currency			
Other assets	<input type="checkbox"/>		Currency	Currency			

*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? Currency

Life assurance arrangements	You	Your partner
Do you have any life assurance arrangements? <i>If yes please provide details</i>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of plan or product		
Type of plan e.g. endowment		
Start date / Termination date		
Sum assured / Death benefit	Currency	Currency
How much life assurance each	Currency	Currency



**Pension arrangements - Type of scheme, such as personal pension, employers pension, civil service pension, SIPP etc.**  
*This is where you detail pensions you are still paying into. Pensions you are drawing should be in the income section on page 3.*

Type of scheme	Provider	Monthly payment	Retirement age	Current value	Projected pension
		Currency		Currency	Currency
		Currency		Currency	Currency
		Currency		Currency	Currency

**YOUR PARTNER'S pension arrangements**

Type of scheme	Provider	Monthly payment	Retirement age	Current value	Projected pension
		Currency		Currency	Currency
		Currency		Currency	Currency
		Currency		Currency	Currency

**Your mutual objectives**

What are your objectives for any regular savings or capital?  Income  Capital growth  Other

Notes (other):

Are there any financial factors that may affect your medium / long term planning i.e. 5 years or more, such as pending expenses e.g. moving house, home improvements, extensions, major holidays, weddings?  Yes  No

If yes, please provide details and estimated costs:

**What is your investment risk profile? - See details described below - Please tick one or more of the boxes. - If you wish feel free to specify a percentage.**

<input type="radio"/> HIGH Risk	%	<input type="radio"/> MEDIUM Risk	%	<input type="radio"/> Risk Averse	%
This is taken to mean you are willing to accept a high level of risk in relation to your portfolio. You realise that such an approach may include investments in specialist sectors and products whose performance may be highly volatile. You also appreciate that certain high risk investments may not be readily realisable, as there may not be a ready market for the sale of such investments and that access to reliable data for valuing such investments may be restricted.		This is taken to mean that for medium to long-term investments, you will accept a broadly based approach which includes a proportion in equity based investments (stocks and shares). You are prepared to accept a degree of volatility in the value of your capital in return for the potential for good medium to long-term rewards.		Clearly, no risk at all is impossible, however, this is taken to mean you are cautious and dislike risk and are intolerant of volatility with regards to the underlying value of your capital. You prefer security of capital and predictable investments. You accept that this may result in low rates of return being earned on your portfolio. You also accept that interest returns from deposit based investments move up and down, and when compared to the rate of inflation may produce a poor real return.	

**Other information - Please use this space to offer any other information that may be pertinent to your situation**

Miscellaneous - How did you hear about KENTINGTONS?

**Your signature and date - If you are completing this on screen, when you return it, we will send you a version to sign digitally.**

Date	Your signature	Date	Your partner's signature

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# 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](mailto:info@kentingtons.com), or post to Kentingtons, 15 Rue des 4 Coins, 83690 Salernes, 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 Kentingtons my consent to hold relevant data in accordance with the above:  No  Yes

Signed:

Date:

Signed:

Date:

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