



## Mr. John Doe : My Data Questions

by : John Doe : (ID:164)

for : Mr. John Doe : (ID:187)

Personal Details		
Question	Question Options	Answer
Gender	Male. Female.	
Date of Birth		
NI Number		
Previous Name		
Forecast Retirement Age		
Maiden Name		
Nationality	(Too Many Options To List).	
Relationship Status	Married. Single. Separated. Engaged. Widowed. Civil Union. Divorced. Domestic partnership. Unspecified.	
Date of Marriage		
Residential Status	Owner. Tenant. Living With Parents. Other.	
Legal Proceedings	No. Yes.	

## Address Details

Question	Question Options	Answer
Address Flat		
House Name/No		
Street		
Address Line 2		
Town or City		
County		
Postcode		
Country	(Too Many Options To List).	
Are you on the Electoral Roll?	I Don't know. Yes. No.	
Residency Started		
Residency Ended		

## Dependents Details

Question	Question Options	Answer
Forename		
Middle Name		
Surname		
Date of Birth		
Relationship	Son. Daughter. Father. Mother. Other Family Member. Other.	
Dependency Reason		

## Current Employments

Question	Question Options	Answer
Job Title		
Employers Name		
Employers Tel No		
Employers Email Address		
Employment Type	I Don't Know. Full Time Contract. Part Time Contract. Probationary Contract. Temporary Contract. Zero Hours Contract.	
Employers Address	Provide Details. I Don't Know.	
Employers Address Line 1		
Employers Address Line 2		
Employers Town or City		
Employers County		
Employers Postcode		
Employers Country	(Too Many Options To List).	
Employment Started		
Employment Ended		

## Previous Employments

Question	Question Options	Answer
Job Title		
Employers Name		
Employers Tel No		
Employers Email Address		
Employment Type	I Don't Know. Full Time Contract. Part Time Contract. Probationary Contract. Temporary Contract. Zero Hours Contract.	
Employers Address	Provide Details. I Don't Know.	
Employers Address Line 1		
Employers Address Line 2		
Employers Town or City		
Employers County		
Employers Postcode		
Employers Country	(Too Many Options To List).	
Employment Started		
Employment Ended		
Final Salary		

## Current Employee Benefits

Question	Question Options	Answer
Employers Name		
If you die while working for your employer is anything paid out to your family?	Yes. No. I Don't Know.	
How much death benefit will be paid out?	A multiple of my salary. A specific amount. I Don't Know.	
Amount of death benefit payout		
Multiple of Salary		
Is your death benefit part of a group life plan?	Yes. No. I Don't Know.	
Who is the plan provider		
Is this a relevant life plan?	Yes. No. I Don't Know.	
If you are too unwell to work for an extended period will your employer continue to pay your salary?	Yes. No. I Don't Know.	
Will your employer pay your full salary, or part of it?	Full Salary. Part of Salary. Full Salary then Part of Salary. I Don't Know.	
How long will your full salary continue?	1 month. 2 months. 3 months. 4 months. 5 months. 6 months. 7 months. 8 months. 9 months. 10 months. 11 months. 12 months. More than 12 months. To Normal Retirement Age. I Don't Know.	

## Current Employee Benefits

Question	Question Options	Answer
How long will your part salary continue?	1 month. 2 months. 3 months. 4 months. 5 months. 6 months. 7 months. 8 months. 9 months. 10 months. 11 months. 12 months. More than 12 months. To Normal Retirement Age. I Don't Know.	
What percentage of salary is paid, when you are on part salary?		
Does your employer offer you private medical insurance?	Yes. No. I Don't Know.	
Who operates the Medical Insurance scheme?	AVIVA. AXA PPP Healthcare. BUPA. SimplyHealth. VitalityHealth. VitalityLife. WPA. Other. I Don't Know.	
Have you claimed on your Medical Insurance in the last two years?	Yes. No.	
Does your employer offer access to a pension for you?	Yes. No. I Don't Know.	
Member of Employers Pension Scheme?	Yes. No. I Don't Know.	
Date Joined		
Pension Type?	Money Purchase. Final Salary. Career Average Earnings. I Don't Know.	
Pension Accrual Rate?		
Other Rate		
Other Pension Accrual Rate?		
Pensions current value?		
Your Contribution Type?	Monetary Value. Percentage. I Don't Know.	

## Current Employee Benefits

Question	Question Options	Answer
Your Monthly Contribution Value?		
Your Monthly Contribution Percentage?		
Employer Contribution Type?	Monetary Value. Percentage. I Don't Know.	
Employers Monthly Contribution Value?		
Employers Monthly Contribution Percentage?		

## Previous Employee Pensions

Question	Question Options	Answer
Previous Employers Name		
Were you a member of your previous employers Pension scheme?	Yes. No. I Don't Know.	
Date Joined		
Date Left		
Pension Type?	Money Purchase. Final Salary. I Don't Know.	
Final Salary Pension Rate?		
Pensions current value?		

## Income Sources

Question	Question Options	Answer
Income Source	Basic Salary. Benefits in Kind. Bonus. Child Benefit. Commissions. Investment. Other Income. Pension. Self Employed (Net Profit). Share Dividends. Working Tax Credit. Child Tax Credit. CSA. Court Maintenance. Informal Maintenance. Additional Employment. Rental Income.	
Income Frequency	Weekly. Monthly. Quarterly. Bi-Annually. Annually. Annually (not guaranteed). One Off Payment.	
Income Amount		
Income Year	2021. 2020. 2019. 2018. 2017. 2016. 2015. 2014. 2013. 2012.	



## Expenditure Details

Question	Question Options	Answer
Expenditure Source	(Too Many Options To List).	
Expenditure Frequency	Weekly. Monthly. Quarterly. Bi-Annually. Annually. One Off Payment.	
Expenditure Type	Essential. Discretionary. I Don't Know.	
Expenditure Amount		
Expenditure End Date		
Additional Details		

## Contingency Planning - Funds

Question	Question Options	Answer
Fund Source?	Deposits. ISA. National Savings. Investment. Other.	
How much do you have?	Less than 1 months expenditure. More than 1 months expenditure. More than 3 months expenditure. More than 6 months expenditure. More than 12 months expenditure.	

## Contingency Planning - Life Assurance

Question	Question Options	Answer
Type of Plan	Life Term Assurance. Critical Illness Term Assurance. Critical Illness and Life Term Assurance. Whole of Life. FIB (Family Income Benefit).	
Life Assurance Provider Name		
Purpose of Plan	Mortgage & Loan Cover. Personal Protection. Family Protection. Other.	
Product Features	Convertible. Renewable. Convertible & Renewable. None. I Don't Know.	
Plan Start Date		
Plan End Date		
Premium Frequency	Monthly. Annually. I Don't Know.	
Premium		
Plan Benefit	Lump Sum One Time Payment. Income Paid Annually. I Don't Know.	
Benefit Amount		
Variance Type	Level. Increases. Decreases. I Don't Know.	
Variance Factor		
Trust	Yes. No. I Don't Know.	

## Contingency Planning - Endowment

Question	Question Options	Answer
Provider Name		
Cover	Single Life. Joint Life. I Don't Know.	
Cover With		
Product Type	With Profits. Unit Linked. I Don't Know.	
Death Benefit		
Sum Assured		
Maturity Value		
Minimum Payout		
Plan Start Date		
Plan Maturity Date		
Term Years		

## Contingency Planning - Disability Benefit

Question	Question Options	Answer
Type of Benefit	CIC (Critical Illness Cover). IPP (Income Protection Plan). ASU (Accident, Sickness and Unemployment).	
Benefit Provider Name		
Benefit Start Date		
Benefit End Date		
Premium Frequency	Monthly. Annually. I Don't Know.	
Premium		
Plan Benefit	Lump Sum One Time Payment. Income Paid Annually. I Don't Know.	
Benefit Amount		

## Contingency Planning - Private Medical Insurance

Question	Question Options	Answer
PMI Provider?	AVIVA. AXA PPP Healthcare. BUPA. SimplyHealth. VitalityHealth. VitalityLife. WPA. Other. I Don't Know.	
Have you claimed on your PMI in the last two years?	Yes. No.	
Plan Start Date		
Plan End Date		
Premium Frequency	Monthly. Annually. I Don't Know.	
Premium		
Family Cover?	Yes. No. I Don't Know.	

## Contingency Planning - Wills & Trusts

Question	Question Options	Answer
Will Type	Mirror. Mutual. Single. I Don't Know.	
Written By		
Date Written		
Special Provision	None. Will Trust. Family Trust. I Don't Know.	
Lasting Power of Attorney	No. Yes. I Don't Know.	
Principal Beneficiaries	No. Yes. I Don't Know.	

## Credit History Details

Question	Question Options	Answer
Credit History Type	CCJ - County Court Judgment. Declared Bankrupt. IVA - Individual Voluntary Agreement. Defaulted. Debt Management Plan (DMP). Mortgage Arrears. Unsecured Arrears. Repossession.	
Date		
Additional Details		

## Existing Loans

Question	Question Options	Answer
Loan Type	Loan. Credit Card. HP - Hire Purchase.	
Provider Name		
Account Number		
Start Date		
End Date		
Monthly Payment		
Minimum Payment		
Interest Rate %		
Outstanding Balance		
Outstanding Balance Date		
New Mortgage	No. Yes. I Don't Know.	
Loan Repayment	No. Yes. I Don't Know.	

## Existing Mortgages

Question	Question Options	Answer
Property Type	Main Residence. Other Residence. Rental Property.	
Property Address Line 1		
Property Postcode		
Initial Purchase Price		
Current Property Value		
Provider Name		
Account Number		
Mortgage Type	Interest Only. Capital and Interest. Part Capital and Part Interest. I Don't Know.	
Mortgage Product	Fixed. Tracker. Discount. Offset. I Don't Know.	
Mortgage Product Duration		
Mortgage Product Interest Rate		
Overall Mortgage Term		
Redemption Fee		
Overpayments	Yes. No. I Don't Know.	
Initial Amount Borrowed		
Mortgage Start Date		
Mortgage End Date		
Outstanding Balance		
Outstanding Balance Date		

## Properties to be Mortgaged

Question	Question Options	Answer
Mortgage Reason	Purchase Residential Property. Purchase Buy-To-Let Property. Purchase Holiday Property. Remortgage Residential. Remortgage Buy-To-Let.	
Monthly Rental Income		
Mortgage Amount		
Mortgage Type	Interest Only. Capital and Interest. Part Capital and Part Interest. I Don't Know.	
Interest Only		
Mortgage Term		
Deposit Amount		
Deposit Source	Savings. Equity. A Gift. A Loan. I Don't Know.	
Mortgage Product	Fixed. Tracker. Discount. Offset. I Don't Know.	
Initial Rate Length		
Allow Early Repayment	No. Yes. I Don't Know.	
Help To Buy	No. Yes. I Don't Know.	
Property Value		
Property Purchase Date		
Property Type	Detached. Semi-Detached. Terraced. Flat (Converted). Flat (Purpose Built).	
Number of Stories		
Flat Floor		
Address Line 1		
Address Line 2		
Town or City		
County		
Postcode		
Country	(Too Many Options To List).	

## Properties to be Mortgaged

Question	Question Options	Answer
Number of Bedrooms		
Number of Bathrooms		
Number of W/C's		
Number of Reception Rooms		
Has Garage	No. Yes.	
Tenure Type	Freehold. Leasehold.	
Years On Lease		
Property Build Year		



## Asset Details

Question	Question Options	Answer
Asset Type	Antiques & Artwork. Bank Deposit. Business. Cash ISA. Collective Investment Account. Current Account. Enterprise Investment Scheme. Exchange Traded Fund. Investment Bond. Investment ISA. Investment Trust. National Savings (Ordinary Account). National Savings Certificates. Offshore Bond. Other. Personal Effects & Chattels. Personal Pension (Non occupational). Property - Commercial. Property - Rental. Property - Residential. Stocks & Shares. Unit Trust/OEIC. Unregulated Collective. Venture Capital Trust.	
Asset Description		
Provider Name		
Provider Based	Jersey. Guernsey. Isle of Man. Dublin. Luxemburg. Other. I Don't Know.	
Bank Name		
Acquired Date		
Purchased Date		
Started Date		
Company Established		
Date Investment Made		
Date Account Opened		
Shareholding		
Initial Value		
Company Value		
Estimated Value		
Current Balance		

## Asset Details

Question	Question Options	Answer
Current Value		
Date of Valuation		
Company Name		
Company/Trust Name		
Seed EIS?	Yes. No. I Don't Know.	
Part of Trust?	Yes. No. I Don't Know.	
ISA Allowance Used?	Yes. No. I Don't Know.	
Is this a Portfolio or Individual Stock?	Portfolio. Individual Stock. I Don't Know.	
Are you still making Contributions?	Yes. No. I Don't Know.	
Contribution Allowance Used?	Yes. No. I Don't Know.	
Drawing Benefit?	Yes. No. I Don't Know.	
Property Owned by Company or Trust?	Yes. No. I Don't Know.	
Property Mortgaged?	Yes. No. I Don't Know.	
Managed By		
Managed By		
Details		
Details		
Details		

## Goals & Priorities

Question	Question Options	Answer
Goal Name		
Goal Type	Short-Term Goal. Medium-Term Goal. Long-Term Goal.	
Describe Your Goal		
Cost of this Goal		
When do you hope to Achieve your goal		
Priority of Goal	1. 2. 3. 4. 5.	

## Professional Advisers

Question	Question Options	Answer
Adviser Type	Accountant. Conveyancer. Estate Agents. Financial Adviser. Solicitor. Stockbroker.	
Company Name		
Contact Name		
Contacts Email Address		
Contact Telephone		
Contact Mobile No.		
Address	Provide Details. I Don't Know.	
Address Line 1		
Address Line 2		
Town or City		
County		
Postcode		
Country	(Too Many Options To List).	
Additional Details		

## Test my notes title

Question	Question Options	Answer
Note		

## My Vault

Question	Question Options	Answer
Identifier		
Identifier Relates To		
Additional Data		