

NORTHWOOD

Financial Services cc

1990/034119/23

Authorised Financial Services Provider in terms of the FAIS Act (Licence no 13296)

PERSONAL INFORMATION

YOUR DETAILS

Name:		Identity No:
Home Address:		
Postal Address:		
Tel: (H)	Tel: (W)	Tel: (C)
E-mail Address:		

MARITAL DETAILS

Tick in Applicable Box:	
Single	Married:
Divorced (<i>Enclose divorce agreement</i>)	<i>In Community</i>
Living Together	<i>Out of Community (with accrual)</i>
Widow	<i>Out of Community (without accrual system)</i>
Widower	<i>In foreign country</i>

SPOUSE'S DETAILS

Name:		Identity No:
Tel: (H)	Tel: (W)	Tel: (C)
E-mail Address:		

CHILDREN

Dependants: name, sex, date of birth: Children – other dependants

Education – have you started saving for your children's education yet?

EMPLOYER

Name of Employer

Qualifications

Job Title

Do you intend keeping this job for the next five years?

What is your Gross Income per month?

FINANCIAL GOALS

At what age would you like to retire?

What net income do you need?

PROPERTY

	Owner	Primary Residence	Other	Other
Address				
Year Purchased				
Original Price				
Current Value				
Current Bond Balance				
Current Interest Rate				
What was the original Bond amount?				
Current monthly repayment amount?				
If you are renting the property – what rental are you getting?				
What percentage do you own?				

VEHICLES

	Owner	Vehicle 1	Vehicle 2	Vehicle 3
Name & Model				
Year Purchased				
Current Value				
O/S Balance				
Current Interest Rate				

BANKING: Accounts with Financial Institutions

	Owner	Bank name	Interest rate on negative balance:	Current balance:
Bank Account #1				
Bank Account#2				
Credit Card #1				
Credit Card #2				

OTHER ACCOUNTS

Only list those accounts which have more than R 5,000.00 outstanding

	Owner	Company name	Interest rate:	Current balance:
Account #1				
Account #2				
Account #3				

Work retirement scheme: - let us have the latest statement

Do you have a Will; is it up to date? - let us have a copy.

Other Documents Required

1. Should you want us to review your short-term – Fax the **existing policy** to us
2. Download a **Broker's Note**, complete and fax to us so we can identify your