FINANCIAL ADVISORS · FREE TEMPLATE

Annual client review form

What changed in a client’s life since you last met, and the documents you need to bring their plan up to date, asked for before the review rather than during it.

Your details

We have filled in what we already have. Change anything that is out of date.

Home address

Marital status

☐ Single
☐ Married
☐ Domestic partnership
☐ Divorced
☐ Widowed

Employer

Annual income before tax

Since we last met

Has any of this changed?

☐ A new job or a change in pay
☐ Marriage, divorce or a new partner
☐ A new child or dependent
☐ Buying or selling a home
☐ An inheritance or a large gift
☐ A change in health
☐ None of these

Tell us more about anything you ticked

I would like to review the beneficiaries on my accounts

Documents

☐ **Your most recent tax return**

☐ **Latest statements for accounts we do not manage**

☐ **Any new insurance policies**