Casterbridge Wealth Investments

Casterbridge Wealth

Investment Proposal Request Form

Introducer Name:

Introducer Firm:

Which accounts do you wish to include in the portfolio?

Investment account ☐ Joint investment account ☐ ISA ☐ SIPP ☐ SSAS ☐ TRUST ☐ OFFSHORE BOND ☐

Relevant Provider if Applicable:

Name of Trust if applicable

About your client	Client 1	Client 2
Name and Title or Company Name:		
Date of Birth:		
Marital Status:		
Current occupation (or at time of retirement if now retired):		
Anticipated age of retirement:		
Are they a UK resident?:		

For SIPP accounts only

Will there be any additional contributions made to the fund? If so, how much each year?	£	
If a defined benefits scheme, please give estimated value of the fund at retirement:	£	
Have benefits been taken? If yes, which benefits?		
If no, when is pension commencement intended to begin (DD/MM/YY)?		
How will income be taken from the fund? *Please delete where not applicable	*Take PCLS, then regular income drawdown	*Take PCLS, then irregular drawdown
	*Take regular withdrawals to include PCLS	*Take irregular withdrawals to include PCLS
If known, what is the anticipated annual pension withdrawal (£ or %)?		
Are there any other considerations we should be aware of?	If yes, please provide details in the client notes	

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INVESTMENTS

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INVESTMENT PROPOSAL REQUEST FORM

Portfolio Mandate: please indicate your client's suitability and investment parameters

Attitude to Risk level - please cirlce below:

Lower / Lower to Medium / Medium / Medium to Higher / Higher

Investment Objective - please circle below:

Capital Growth / Capital Growth & Income / Income

Ability to bear Loss level - please circle below:

Low / Moderate / Significant

Expected Investment: £

Proposed Mandate: Please circle desired mandate	1. Defensive 2. Cautious 3. Cautious Income 4. Balanced 5. Balanced Income 6. Moderately Adventurous 7. Adventurous
Benchmark: Please tick relevant benchmark indicated by the numbered mandates above	Your portfolios can be assessed against the following benchmarks: MSCI PIMFA Private Investor Conservative Index – the benchmark typically holds 32.5% in equities ☐ (1, 2 & 3) MSCI PIMFA Private Investor Income Index – the benchmark typically holds 52.5% in equities ☐ (4 & 5) MSCI PIMFA Private Investor Balanced Index – the benchmark typically holds 62.5% in equities ☐ (6) MSCI PIMFA Private Investor Growth Index – the benchmark typically holds 77.5% in equities ☐ (7)

Cashflows	Joint	Client 1	Client 2
Initial Investment £:			
Anticipated further investment £:			
Required regular income £:			
Frequency of Income:			
Source of funds (Pension, Inheritance, Investments etc)			

Fees and Charges - DPS	
Expected Initial Adviser Fee	
Ongoing Adviser Fee	
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Client notes and background

(Include any client backgrounds/investment experience/restrictions/financial liabilities (children, holidays, etc.) we should be aware of, CGT or ISA allowances, etc.)

Print name:

Signature:

Date:

Note: We will acknowledge receipt of your request and confirm the expected delivery timescale, usually within 5 working days.

For office use only: **Checked By:** **Date:**

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