

Financial Services Questionnaire



First Point
www.tailoredinsurance.com

Please complete and return this form to:

First Point Insurance Management, 9 Pondwood Close, Moulton Park, Northampton NN3 6RT

General Enquiries: 0845 490 55 55 • Facsimile: 0845 490 66 66 • email: contactus@tailoredinsurance.com

How did you hear about us?

Personal Details

Title		First Name/s	
Surname		Date of Birth	
House Name or No.		Street	
Area		Town	
County		Post Code	
Home Telephone		Daytime Telephone	
Mobile Telephone		E-mail Address	

Areas of Interest

Mortgages

- | | |
|--|---|
| <input type="checkbox"/> Obtaining a mortgage | <input type="checkbox"/> Reducing my mortgage outgoings |
| <input type="checkbox"/> Reviewing my endowments | <input type="checkbox"/> Reducing the term of my mortgage |

Life Insurance

- | | |
|--|--|
| <input type="checkbox"/> Reducing the cost of life cover | <input type="checkbox"/> Increasing life cover |
| <input type="checkbox"/> Reviewing life cover | |

Critical Illness Cover

- | | |
|--|---|
| <input type="checkbox"/> Further information on critical illness cover | <input type="checkbox"/> Reviewing critical illness cover |
|--|---|

Permanent Health Insurance

- Income in the event of illness, accident, sickness or redundancy

Investments

- | | |
|--|--|
| <input type="checkbox"/> I have a lump sum to invest | <input type="checkbox"/> I wish to review my savings |
| <input type="checkbox"/> I wish to save monthly | <input type="checkbox"/> I am interested in ISA's |

Pensions

- | | |
|--|--|
| <input type="checkbox"/> I wish to review my pension | <input type="checkbox"/> I am interested in pension planning |
|--|--|

I own a company/ I am senior management and I am interested in the following products for my company

- | | |
|---|--|
| <input type="checkbox"/> Stakeholder pensions | <input type="checkbox"/> Insuring key personnel |
| <input type="checkbox"/> Key employee benefit | <input type="checkbox"/> Private medical insurance |

Others

- I am interested in (please specify) _____

Thank you for taking the time to complete this form