



A.Y.S FINANCIAL SERVICES

FINANCIAL ADVISERS INSURANCE INTERMEDIARIES
MORTGAGE INTRODUCERS LIFE ASSURANCE ADVISERS

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ADVICE REQUEST FORM

As Financial Advisers, we specialise in providing advice on a range of areas. Below is a list of some of the things we can advise you, or Introduce you to advisers who specialise in that area.

Please tick any areas that are of interest to you and **post or email** it back to me at **ays@btconnect.com**.

Client Name: _____

Email: _____

Telephone number: _____

Investments & Savings

I have a lump sum to invest	
I want to start a monthly savings plan	
I want to look at tax efficient savings	
I want to look at ethical investing	
I want to start or top up an ISA	
I want to look at offshore investments	
I want to review my current savings/investment plan(s)	
I want to start a savings plan for my child/grandchild	

Tax Planning

I think I may have an Inheritance Tax Liability	
I think I may have Capital Gains Tax to pay	

The FCA does not regulate some forms of tax planning and offshore investments.

Retirement Planning

I want to start a pension plan	
I want to see how my pension plan is doing	
I want to increase my contributions	
I have a lump sum to invest	
I am approaching retirement and need to know what my options are	
I have retired and need to know what my options are	
I have more than one pension and wonder if I should merge them	

Protection & Insurance

I want to protect my income in case I am ill	
I want to look at redundancy cover	
I want to look at Private Medical Insurance	
I want to make sure my family are OK if anything happens to me	
I want to review my existing life/critical illness insurance policy	

Wills

I need to write or alter my will	
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Mortgages

I want to make sure my current mortgage is still right for me	
I am coming off a fixed rate deal and want to know what my options are	
I am about to buy my first property and need advice	
I am interested in buying a property to rent out	
I am looking to buy a property for my child/children/parent	

Your property may be repossessed if you do not keep up the repayments on the mortgage.

General Insurance

I want to review my household insurance	
I have a rented property that I need to insure	
I want to discuss Commercial/Liability Insurance	