



## NEW CLIENT - PERSONAL INFORMATION SHEET

Surname	D.O.B	Private Address	
First names	N.I. No.		
Maiden Name	Occupation		
Marital status	Job Title	Telephone No.	
Date of Marriage	Starting date	Mobile No.	
Date of separation/divorce	<b>tick as applicable:</b>	Fax No	
Name of Wife/Husband/Partner	Self Employed	Email address	
Wife/Husband/Partner D.O.B	Employed		
Wife/Husband/Partner NI No.	Retired		
Children's names (if under 18)	Employer's Name: (if applicable)	Tax District	
D.O.B.s	Employer's address	PAYE ref: (if applicable)	
Schools/College	Telephone No.	UTR ref:	
<b>Bank Accounts</b>			
Bank Name & sort code	Account name	Account No.	Is this a joint account? Yes ( <b>tick if applicable</b> )
1.....	.....	.....	
2.....	.....	.....	
<b>Building Society</b>			
Building Soc. Name & sort code	Account name	Account No.	Is this a joint account? Yes ( <b>tick if applicable</b> )
1.....	.....	.....	
2.....	.....	.....	
<b>Address of any properties owned/rented other than home address</b>	Do you have a will? YES/NO Date of Will?	<b>Solicitors name &amp; address</b>	