



### Confidential Client Contact Information

Please printout & fax to +41 44 389 82 89 or e-mail to csv@devereandpartners.com

Client name

Confidential e-mail address (please be clear)

Daytime telephone including full international code

Home telephone including full international code

Mobile including full international code

Confidential fax including full international code

Confidential private mailing address including country \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Policy numbers if known \_\_\_\_\_

Are you happy with the way your funds are performing?

When did an advisor last review your fund selection?

Are you receiving our regular deVere and Partners newsletter by email?

Would you benefit from a review of your financial goals?

Comments & client feedback. This is your opportunity to tell us of any products or services you would like to see, such as special offers investor commentary, website developments etc.  
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I am thinking of increasing my investments by  %

**Please tick if you require information on any of the following**

Please tick  
 Retirement  Education  EU Savings Tax  Regular Savings  Lumpsum Investments

Date of next anticipated investment increase or new additional investment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_