

Fact File

Why give us these facts?

To help us tailor advice and financial solutions that are specific to your needs and circumstances – or to those of the person who needs care – we ask you to complete this Fact File. The confidential information you supply enables us to understand the unique circumstances and requirements, and to give you appropriate advice.

We're here to help

You may have questions or need help when completing the Fact File. If so, call us on 01582 794967 during normal office hours or email us at care@carefeesplanning.com

What happens next?

Once you have completed every section of the Fact File as fully as possible, please send it to our head office FREEPOST address below (there is no need for a stamp).

Alternatively, visit www.carefeesplanning.com and give us the facts online. It's that easy.

Once we have all the facts, we can prepare a report for you and arrange an appointment to talk through the various options available.

Please use the reverse of this Fact File if you need more room to give your answers.

Brownlow Wealth Management Ltd

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Telephone: 01582 794967

Fax: 01582 794971

E-mail: care@carefeesplanning.com

www.carefeesplanning.com

Private and Confidential

CARE FEES PLANNING

Brownlow Wealth Management Ltd

Solving your problems of paying for care

Contact details

Complete this section only if you are acting on behalf of the person who needs care (or please go to next section).

Title _____

Full name _____

Address _____

Postcode _____

Telephone (day) _____

(evening) _____

We may contact you by telephone or email

Personal details of the person who needs care

Title _____

Full name _____

Address _____

Postcode _____

Telephone (day) _____

(evening) _____

Date of birth _____

Marital status _____

Private and Confidential

CARE FEES PLANNING

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Date of admission *(if known)*

Fees

Is care required already

Yes

No

Financial details of the person who needs care

Existing or anticipated income

(state whether weekly/4 weekly/monthly/annually)

State Pension

£

Private Pension

£

Investment income

£

Rental income

£

Other income

£

Attendance Allowance

£

Disability Living Allowance

£

Registered Nursing Care Contribution

£

Pension Credit

£

Capital and savings

Bank Current Accounts

£

Building Society/Savings Accounts

£

Shares/Unit Trust investments etc

£

Cash ISAs

£

Shares ISAs

£

Premium Bonds £

Other £

Property

Value of property

£

Mortgage on property?

Yes

No

If yes please state amount

£

Is property owned:

in sole name

as Joint Tenants

as Tenants in Common

not certain

If Joint Tenants/Tenants in Common, please give name(s) of joint owners

Mr/Mrs/Miss/Other

Mr/Mrs/Miss/Other

Name of person(s) completing form

Signature(s)

Date

Brownlow Wealth Management is a representative of St. James's Place Wealth Management plc which is authorised and regulated by the Financial Services Authority.

Data Protection Act 1998

The information recorded above may be retained on computer for reference purposes and will be held in accordance with the above act. You agree that the personal information held by Brownlow Wealth Management may be disclosed on a confidential basis. You also agree that this information may be transferred electronically, e.g. email and you agree that ourselves, or any such third party, may contact you in the future by any means of communication which we consider appropriate at the time.

We will not pass your details to companies outside Brownlow Wealth Management Ltd and St. James's Place Wealth Management plc without your consent.

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