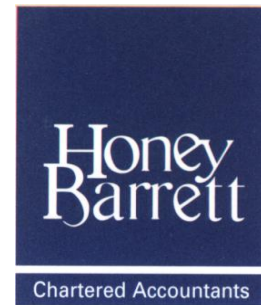


CLIENT NAME: _____

E-MAIL ADDRESS: _____

Please use your Open Space account via HB Client's Portal to upload records securely. To create one, please contact a member of the admin staff to assist you.

We need to annually update our knowledge of you and your circumstances. Please provide answers to these question to the best of your knowledge and copies of records where requested.



About You

		Supporting documents enclosed (✓)
a) Cohabitation Status (married/civil partner/ partner/ divorced/ separated/ widowed/ single) Name of spouse/partner Date of marriage/civil partnership Date of separation/divorce/widow		
b) Do you have any children (Y/N) Names and dates of birth of children Have your or any other children lived with you in the tax year?	Child's Name	Date of Birth
c) Are you a Home Owner (Y/N) Do you have a Mortgage Mortgage Renewal Date Current approximate balance		
d) Do you Own any other Properties (please list them below with their approximate values) 1 2 3 4 5	State if joint or sole ownership	Approx. Value
e) Do you have a Will - (Y/N) Date the Will was Made? Do you consider it to be Up-To-Date?		
f) Is a Lasting Power of Attorney in force? (Y/N) Please provide a copy if applicable		

OUR KNOWLEDGE OF YOU WILL BE ONLY USED FOR THE CONTRACTUAL SERVICES AGREED WITH HONEY BARRET TO PROVIDE YOU WITH THE BEST SERVICE AND ADVICE. NO DETAILS WILL BE SHARED WITH ANY OTHER PARTIES AT ANY TIME. YOU HAVE THE RIGHT TO NOT PROVIDE THE DETAILS OR REQUEST THAT WE REMOVE THEM FROM OUR SYSTEMS AT ANY TIME.

Websites:

- www.honeybarrett.co.uk
- www.hbpayrollservices.co.uk
- www.honeybarrettmedical.co.uk
- www.honeybarrettbookkeeping.co.uk

- Bexhill-on-Sea Telephone (01424) 730345
- Eastbourne Telephone (01323) 412277
- Wadhurst Telephone (01892) 784321

Helping you get from where you are now to where you want to be...

