

M^cCARNEY FINANCIAL SERVICES

Financial Planning Review



29 Whitworth Road,
Drumcondra,
Dublin 9
01 8305432
www.mccarney.ie
info@mccarney.ie

The purpose of completing this Financial Planning Review is to ensure that the recommendations suggested are tailored to your personal requirements. We request that you help us to provide the most appropriate advice by providing us with details about you and your family. This document will be the basis for our recommendations.

Financial Planning Review:

You & Your Family:					
SELF:			PARTNER:		
Name: Mr/Mrs/Ms.			Name: Mr/Mrs/Ms.		
Telephone:			Telephone:		
Email Address:			Email Address:		
Date of Birth:		Smoker: Y / N	Date of Birth:		Smoker: Y / N
Single / Married/ Widowed/ Other:			Single / Married/ Widowed/ Other:		
Address:			Address:		
Are you – Home owner / Renting / Living with family?			Are you – Home owner / Renting / Living with family?		
No of Dependants:	Ages: / / / /		Do you pay maintenance, if yes amount per month?		
Your Occupation:					
SELF:			PARTNER:		
Occupation:			Occupation:		
Employer:			Employer:		
Address:			Address:		
Permanent: Y / N		Full time: Y / N	Permanent: Y / N		Full time: Y / N
Pensionable: Y / N		Subject to contract: Y / N	Pensionable: Y / N		Subject to contract: Y / N
Basic Annual Income: €			Basic Annual Income: €		
Regular Overtime: €			Regular Overtime: €		
Bonus / Commission: €		Guaranteed: Y / N	Bonus / Commission: €		Guaranteed: Y / N
Total Annual Income: €			Total Annual Income: €		
Credit History:					
Do you anticipate any issues arising in relation to your credit history? Yes / No - if yes please explain below					
Existing Protection Policies:					
	Provider/policy no	Self	Partner	Children	Premium
Mortgage Protection:					
Serious Illness Cover					
Personal Life Cover					
Income protection					
Death in service benefit					
Do you have any medical history that may affect the underwriting of any new protection policy? YES/NO – if yes please provide details:					

Pension / Retirement planning:

Pension provider & policy reference:	Retirement age:	Current payment:	Current/Transfer value:	Investment fund:

Retirement planning:

Do you have any personal pension plans or PRSA's? **YES / NO**

Do you have any preserved benefit from a previous occupation? **YES / NO**

Are you currently in a company pension scheme? **YES / NO**, if yes what type of scheme, Defined benefit/contribution?

At what age would you like to have the option of accessing your pension benefits? **1) 50-60 or 2) 60 +**

If you retired tomorrow what percentage of earning would you like to enjoy? _____%

Are you interested in exploring the options available to you with regards to your current pension arrangements or preserved benefits? **YES / NO**

Mortgages & Loans:

	Lender	Amount borrowed	Loan O/S	Value	Term Remaining	Interest rate	Property Type	Rental
MORTGAGE		€	€	€				
MORTGAGE		€	€	€				
MORTGAGE		€	€	€				
Other loans		€	€	€				
Credit Union		€	€	€				
Visa / Credit Cards		€	€	€				

Savings & Investment:

Regular / lump sum Savings	Contribution	Frequency	Current Balance	Average over last 6 months
Current account	€		€	€
Savings Account	€		€	€
Credit union / other	€		€	€

