

NEW ENQUIRY CONTACT FORM

To be used for all new enquiries and client introductions
Fully complete all details below and return this form to enquiries@nexusifa.co.uk

DATE:		FORM COMPLETED BY:	
SOURCE OF ENQUIRY – PLEASE ✓ AS APPROPRIATE			
New Client <input type="checkbox"/> Existing Client <input type="checkbox"/> Walk-in <input type="checkbox"/> Internet <input type="checkbox"/> Phone call <input type="checkbox"/> Marketing/Mail Shot <input type="checkbox"/>			
Advocate/Introducer Lead <input type="checkbox"/>		Client Referral <input type="checkbox"/>	
NAME:		NAME:	
Advocate Consent Form attached <input type="checkbox"/>			
CLIENT DETAILS			
Title	First Name(s) (include all middle names)	Surname	DoB
PARTNER DETAILS			
Title	First Name(s) (include all middle names)	Surname	DoB
ADDRESS			
POSTCODE:			
TEL. NO (DAYTIME)	TEL. NO (EVENING)	TEL. NO (MOBILE)	BEST TIME TO CONTACT
			AM <input type="checkbox"/> PM <input type="checkbox"/> ANY TIME <input type="checkbox"/>
EMAIL ADDRESS			
EMPLOYMENT STATUS			
Employed <input type="checkbox"/> Self-Employed <input type="checkbox"/> Retired <input type="checkbox"/>		TOTAL ANNUAL INCOME	£
EMPLOYER/COMPANY		PARTNER'S ANNUAL INCOME	£
ENQUIRY TYPE – PLEASE ✓ AS APPROPRIATE			
PENSION	<input type="checkbox"/> Personal Pension <input type="checkbox"/> Annuity <input type="checkbox"/> Drawdown <input type="checkbox"/>		Review of Existing Plan(s) <input type="checkbox"/> New Plan to be Arranged <input type="checkbox"/> Please use notes for clarification
INVESTMENT	<input type="checkbox"/> ISA <input type="checkbox"/> GIA <input type="checkbox"/> U/T <input type="checkbox"/> OEIC <input type="checkbox"/> Bonds <input type="checkbox"/> IHT Planning <input type="checkbox"/> Other <input type="checkbox"/> (Please confirm) -		
PROTECTION	<input type="checkbox"/> Mortgage Life Protection <input type="checkbox"/> Family / Level Life Cover <input type="checkbox"/> Family Income Benefit <input type="checkbox"/> PHI/IPP Plan <input type="checkbox"/> Key Person <input type="checkbox"/> Other <input type="checkbox"/> (Please confirm) -		
MORTGAGE	<input type="checkbox"/> First time buyer <input type="checkbox"/> Purchase <input type="checkbox"/> Re-mortgage <input type="checkbox"/> Buy to Let <input type="checkbox"/> Let to Buy <input type="checkbox"/> Equity Release <input type="checkbox"/> Help to Buy <input type="checkbox"/>		
NAME OF EXISTING LENDER (IF APPLICABLE)	PURCHASE PRICE/CURRENT VALUE	MORTGAGE AMOUNT REQUIRED	DEPOSIT/EQUITY
	£	£	£
QUOTES REQUIRED?			
Forms available on the Adviserzone.			
Quote Request Form – Life/Family/Mortgage Protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quote Request Form – Business Protection/Relevant Life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enhanced Pension Annuity Quotation Request Form (p17 for standard Annuity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER NOTES - Please provide further details for clarification			
FOR OFFICE USE ONLY – NEXUS INTERNAL STAFF TO COMPLETE			
ADDED TO LEAD PIPELINE BY:		REFERRED TO IFA	Yes <input type="checkbox"/> No <input type="checkbox"/>
DATE:		IFA'S NAME:	DATE: