**Annual Review Fact Find Update**

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| **Client:** |  |
| **Date of review:** |  |
| **Location:** |  |

| **Brought forward from last review:** | **Target assessment** | **For consideration this review** |
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| **Circumstances including goals** |  | **Action Points:** |
| **Investment** |  | **Action Points:** |
| **Protection** |  | **Action Points:** |
| **Taxation** | **ETC** | **Action Points:** |
| **Real estate** |  | **Action Points:** |
| **Pension** |  | **Action Points:** |
| **Debt** |  | **Action Points:** |
| **Estate planning** |  | **Action Points:** |
| **Income** |  | **Action Points:** |
| **Recurring expenditure** |  | **Action Points:** |
| **Capital expenditure** |  | **Action Points:** |