BestInvest Free Portfolio Evaluation Form

To take advantage of our free evaluation service, please list the funds in your portfolio below (minimum £50,000 of funds paying trail commission) or attach a spreadsheet with the necessary details (you can obtain the required fund details from a recent valuation). Please also select your investment objectives, as appropriate. We are not able to provide an evaluation if these details are not fully completed.

Your Name: _____ Postcode: _____

Tel: _____ *(Should we have any queries regarding the information below)*

Investment Funds						
Company	**Fund name**	**ISA?**	**PEP?**	**Units**	**'Inc' or 'Acc' units?**	**Owner**
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Your Objectives

To help us compare your existing portfolio to a portfolio model that we believe is appropriate to your objectives, please complete the following:

Income required from my investments ☐ Nil ☐ 2-4% ☐ Over 4%

Years before requirement change ☐ Less Than 3 Years ☐ 4-6 Years ☐ 7-10 Years ☐ Over 10 Years

Downside risk tolerance ☐ Nil ☐ 10% ☐ 20% ☐ 30%