

Dear _____

Confirming details of our appointment

Date _____

Time _____

Venue _____

Please bring with you:

- ID (passport or driving licence)
- Proof of residence (recent utility bill)
- Confirmation of income (recent pay slip)
- Bank statements (most recent)
- Details of any existing financial arrangements (life assurance, mortgages etc.)

My details:

Your name
Your address
Your postcode
Your phone number
Your email address

Your firm's regulatory information goes here

Sample