



# financialsurgery

## Enquiry Form

**DID is committed to providing you with independent financial advice. This means the widest spectrum of financial advice and wealth management is available to you from DID. Listed below are some of the areas we can help you with upon request – simply tick the boxes, add your name, address and telephone numbers and return by Fax to 020 7990 9812 or by post using the prepaid envelope provided:**

To DID, please let me have advice on the following:

- |  |   |
|--|---|
| <input type="checkbox"/> New ISA Investing before Tax Year End | <input type="checkbox"/> Advice on Pondering Lifetime and Annual Allowance Limits |
| <input type="checkbox"/> ISA Transfer and Consolidation        | <input type="checkbox"/> Supplementing the NHSPS                                  |
| <input type="checkbox"/> Cash ISA Review                       | <input type="checkbox"/> Free Copy of Tax Shelter Guide                           |
| <input type="checkbox"/> Cautious Investing                    | <input type="checkbox"/> Free Copy of Retirement Guide                            |
| <input type="checkbox"/> Investing through EIS                 | <input type="checkbox"/> Retiring Early   |
| <input type="checkbox"/> Ingenious Infrastructure EIS          | <input type="checkbox"/> Investment and Pension Review Service                    |
| <input type="checkbox"/> Deepbridge Technology Growth EIS      | <input type="checkbox"/> Pre Retirement/At Retirement Planning                    |
| <input type="checkbox"/> Invotec EIS and SEIS                  | <input type="checkbox"/> Post Retirement Planning                                 |
| <input type="checkbox"/> Heath and Wellbeing Fund              | <input type="checkbox"/> Inheritance Tax Mitigation                               |
| <input type="checkbox"/> Seed Advantage SEIS                   | <input type="checkbox"/> Income and Financial Planning in my Retirement           |
| <input type="checkbox"/> VCT Review and Investing              | <input type="checkbox"/> SIPP Investing   |
|  | <input type="checkbox"/> <b>A Full Review of my Portfolio</b>                     |

Other – please state in box

**Please complete below in block capitals**

Name \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

Date of Birth  Post ☐ GP ☐ Dentist ☐ Consultant ☐ Other Post (Please state)

Daytime Telephone No. \_\_\_\_\_ Evening Telephone No. \_\_\_\_\_

Email address\* \_\_\_\_\_ Mobile No. \_\_\_\_\_

\*If you provide us with your email address you give us authority to communicate with you from time to time through this medium and we may also send you future publications to this address.

**You can also call us on 020 3638 5050 or enquire through the Enquiry Page of our website  
Individual Financial Surgery will then follow geared to your own needs.**

**FAXBACK TO  020 7990 9812  
or post back in the reply paid envelope**