

Initial Consultation Request Form



1. Client Information.

Title

First name

Last name

Company name (if applicable)

Street Address

City

Postal Code

Telephone

Mobile

Email Address

2. Client Verification Documentation.

Please attach pdf copy of
(a) either passport or photo driving licence and
(b) recent utility bill or current council tax bill (mobile bill not acceptable).

3. Nature of Advice Sought.

Please provide brief summary of advice sought:

4. Relevant Documentation and Correspondence.

Please attach copies of all relevant documentation and correspondence. It would be helpful if you would arrange any correspondence in ascending date order (beginning with the oldest and ending with the most recent) and attach this as one pdf document – not a series of separate pdf documents. Please ensure that all copies are legible and do not provide copies of screen shots.

5. Important Note.

Please note that if we do not receive all the above client information and client verification documentation or if we are unable to access or read any part of the documentation and correspondence we will be unable to accept instructions and will not be able to advise.