

i Please use this form to alert us to any special care your clients may need. Once completed, please return with a new business application in the post, or email a password-protected version securely to clientservices@parmenion.co.uk. The information disclosed in this form is sensitive and needs to be handled with care. Please make sure that any information captured here is accurate.

① Client details

Title	Surname
<input type="text"/>	<input type="text"/>
Full first name(s)	Postcode
<input type="text"/>	<input type="text"/>
Client reference number (if account is already held with Parmenion)	Adviser Firm/Name
<input type="text"/>	<input type="text"/>

② Their circumstances

Health

- Terminal illness
- Long-term illness
- Hearing impairment
- Visual impairment
- Physical disability
- Elderly client
- Anxiety
- Depression
- Young adult

Capability & Resistance

- Low knowledge of finance
- Unable to freely travel
- Low or erratic income
- Low savings
- Gambling addiction
- Over indebtedness

Life events

- Bereavement
- Retirement
- Income shock
- Job loss
- Relationship breakdown
- Birth/adoption
- Domestic abuse
(including economic control)
- Caring responsibility
- Employees
- Unallocated clients
- Suffered a recent financial scam

Neurodiversity

- Autism
- ADHD/ADD
- Dyscalculia
- OCD
- Learning impairments
- Downs syndrome
- Sensory processing disorder

Other (Use 'Other' if their circumstance is not listed above)

Please provide any further details on the extra care needed

Any questions? | To speak to one of the Parmenion team, you can call **0117 204 7678** or email clientservices@parmenion.co.uk

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