

Client(s) Name	
OPAC Advisor Name	
Date Fact Find Completed	

This questionnaire is designed to provide your OPAC property adviser with information that will enable a professional and individually tailored property investment recommendation to be made that best suits your personal investment strategy and objectives.

To ensure that suitable advice is provided and recommendations are based on sound information, it is important that the questions are answered as fully as possible, where relevant.

CLIENT DETAILS

	Self		Partner	
Title / Sex				
Forename(s)				
Surname				
Known as				
Date of Birth / Marital Status				
UK Resident				
Home Address (Only complete partner if different)				
Home Telephone Number				
Mobile Number				
E-mail address				
Preferred method of contact				

Limitation of Advice

I / We understand that OPAC will limit our advice to one or more of the following areas and that OPAC will recommend that I/We seek independent legal and financial advice where necessary.

Client Objectives / Financial Goals

	Now / Future / Declined / Not Relevant		
	Self	Partner	Priority 1-5
1. Property Investment			
I / We want to invest in one or more off plan investment property opportunities to achieve the aim of short term capital growth by selling our property option prior to legal completion.			
I / We want to invest in one or more off plan investment property opportunities to achieve the aim of medium to long term capital growth and then generate an income by completing on the proper and renting the property on either a short or long term basis..			

I/We want to invest in an already completed resale property to achieve long term capital growth by the long term natural capital appreciation of the property market.			
I / We want to invest in a self build project by purchasing investment land.			
I/We want to invest in an already completed resale property to achieve short term capital growth by the purchase of an already completed or soon to be completed "distressed" sale opportunity.			
Notes:			

INVESTMENT BUDGET		Lump Sum
Please specify the amount that you wish to invest in an investment property		Sterling £
		Euros €
Please specify if this amount is to cover stage payments prior to completion or is the overall total amount of the purchase price		Stage Payments/Full Price
Source of Funds i.e. equity release, cash savings or realisation of existing investment?		
Notes:		

TIMESCALE TO INVESTMENT	
Please indicate the timescale to your initial investment once a suitable opportunity has been decided upon, this is extremely important as many off plan investment opportunities are sold out very quickly. OPAC do not wish to recommend an investment that will be completely subscribed by the time you are in a position to take advantage of this opportunity.	
When a suitable investment is recommended I can go ahead immediately/1 month/ 3 months/ 6 months/ 1 year/ not sure (please delete or cross out the non appropriate timescales)	

GEOGRAPHIC AREAS OF INTEREST			
	Now/ Future/ Declined/ Not Relevant		
	Self	Partner	Priority 1-5
Spain			
Morocco			
Bulgaria			
Brazil			
Malaysia			
Egypt			

SUMMARY OF CLIENT NEEDS	
Notes:	

INITIAL PROPERTY INVESTMENT IDEAS	
<ul style="list-style-type: none"> Briefly summarise agreed course of action. 	