

# INVESTMENT BOND

## SOURCE OF WEALTH DETAILS

Phoenix Wealth, Unit Linked Life & Pensions, PO Box 1393, Peterborough, PE2 2TP.

### What is this form for?

You need to confirm the details of your source(s) of wealth for an investment of £250,000 or more to comply with industry regulations.

<b>Full name</b>	<input type="text"/>
<b>Bond number</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Savings from employment/income

<b>Applicants annual income</b>	£ <input type="text"/>
<b>Employer's name</b>	<input type="text"/>
<b>Nature of employers business</b>	<input type="text"/>

### Existing investments

<b>Amount received by applicant</b>	£ <input type="text"/>
<b>From which company</b>	<input type="text"/>
<b>How long were the investment(s) held</b>	<input type="text"/>
<b>Date funds received</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Property sale

<b>Total sale amount</b>	£ <input type="text"/>
<b>Property address</b> (inc postcode)	<input type="text"/> <input type="text"/> <input type="text"/>
<b>Location of property</b>	<input type="text"/>
<b>Date of purchase and sale</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Company sale or sale of interest in company

<b>Name and location of company</b>	
<b>Total sale price</b>	£ <input type="text"/>
<b>Applicant's share</b>	£ <input type="text"/>
<b>Nature of business</b>	
<b>Date of sale</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Share sale

<b>Sale value of shares sold</b>	£ <input type="text"/>
<b>How sold</b> (through stockbroker/bank, etc)	
<b>How long were the shares held</b>	
<b>Date of sale</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Loan

<b>Amount of loan</b>	£ <input type="text"/>
<b>Why was it required</b>	
<b>Name and location of loan provider</b>	
<b>Date of loan</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Gift

<b>Total amount</b>	£ <input type="text"/>
<b>Details of benefactor</b>	
<b>Reason for gift</b>	
<b>Relationship to benefactor</b>	
<b>Date of gift</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Inheritance

<b>Total amount received</b>	£ <input type="text"/>
<b>Name of benefactor</b>	
<b>Relationship to benefactor</b>	
<b>Date received</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Competition or gambling win

<b>Total amount</b>	£ <input type="text"/>
<b>Where and how was it won</b>	
<b>Details of organisation paying prize</b>	
<b>Date of win</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Compensation payment

<b>Total amount</b>	£ <input type="text"/>
<b>Who made the payment</b>	
<b>Reason for payment</b>	
<b>Date received</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

### Other

<b>Nature of income</b>	
<b>Amount</b>	£ <input type="text"/>
<b>Received from whom</b>	
<b>Date received</b>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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