

# WE LIKE TO HELP

## HOW TO COMPLETE & RETURN A PDF

There are a number of Forms and questionnaires on our website and in the Personal Finance Portal (PFP) document area that we ask you to complete and return. These forms have all been prepared as fillable pdfs for your convenience – you do not need to print, fill in by hand, scan to upload, or send by post.

We have become aware that some people are confused about how to do this successfully, so we have prepared the following guidance:

- **Locate the form or questionnaire that you need**
- **Download the document**
- **Save as 'Your name - Name of form' e.g. Jane Smith - Ethical Questionnaire**
- **Complete the information required in the form**
- **Save again (this should mean that if you close the form and then open your saved copy all of your information is now saved to the form)**
- **Upload your completed form to The Portal (we recommend that you do not send by email for your own security)**

---

For more information, call: **0121 554 4444** or email: [enquiries@interface-ifa.co.uk](mailto:enquiries@interface-ifa.co.uk) [www.interfacefinancialplanning.co.uk](http://www.interfacefinancialplanning.co.uk)