

# GETTING TO KNOW YOU

## OUR CLIENTS

As part of our information gathering exercise so that we can provide you with appropriate advice which is suitable for your circumstances, we need you to complete a number of questionnaires.

The Fact Find can be completed via your Personal Finance Portal (PFP) account and it is normally completed in collaboration and guidance from us. For help please refer to Personal Finance Portal - Updating Your Profile.

You should have received an email with a link for you to complete your Finametrica Risk Profile questionnaire. Please let us know if you have not received it and we will resend.

The Knowledge & Experience and the Ethical Investment questionnaires are all available from our website and they are also in the document area of your Personal Finance Portal account.

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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)