



QROPS – Initial Enquiry Questionnaire

Client Name	
D.O.B.	
Transfer Value and Type of UK Pension Scheme	
Where is the client resident or going to become resident	
How long have they been non UK Resident *	
Which country are they Ordinary Resident *	
Which country is the client domicile *	
Is there a possibility of returning to the UK / If so is the timescale known	
Is there a possibility that the client may move to a country other than the UK or that mentioned above (Timescale)	
Nationality	
Country of Residency of dependants	
Has the client commenced taking benefits or if not when would they anticipate taking benefits	
If they have commenced taking benefits and are non resident are they receiving payments gross or net of income tax	
Will they continue to have any other UK income or local income	
Rank Client priorities: 1) Generation Planning 2) Tax Efficient Withdrawals 3) Flexibility to take greater levels of withdrawals (client is aware that fund could erode at a faster rate) 4) Withdrawals need to be maintained throughout retirement (maximum UK limits are sufficient). 5) Currency Risk Mitigation	<div style="display: flex; flex-direction: column; align-items: center; gap: 10px;"> <input style="width: 50px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 50px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 50px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 50px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 50px; height: 20px; border: 1px solid black;" type="text"/> </div> <div style="border: 1px solid black; padding: 10px; margin-top: 20px; text-align: center;"> <p>Please rank your priorities with 1 being the highest, to 5 being the lowest.</p> </div>

Any other important client objectives	
Any other important factors	

IFA Name

IFA Signature.....

*Notes

Resident

- If you're in the UK for 183 days or more in a tax year, you are "resident" for that year for tax purposes
- If you come to live in the UK permanently or to remain for three years or more, you are resident from the date of arrival
- You are also treated as resident if you are in the UK for an average of 91 days or more in a tax year (worked out over a maximum of four consecutive tax years)

Ordinary Resident

- If you are resident in the UK year after year you will normally be treated as "ordinarily resident"
- You are treated as ordinary resident in the UK from the date you arrive if it is clear that you intend to stay for at least three years

Domiciled

- Your domicile is normally acquired at birth, but this is a general law concept covering a range of factors