

Personal Details

	Nigel Roberts	Jane Roberts
Title	Mr	Mrs
First Name	Nigel	Jane
Middle Name	Paul	Louise
Surname	Roberts	Roberts
Salutation		
Maiden/Previous Name		
Date of Birth	03/03/1972	30/06/1964
Age	47	54
Gender	Male	Female
Marital Status	Married	Married
Since		
Nationality	English	English
National Insurance No.	NX714980A	NE219224B
Do you have a valid Will?	Yes	Yes
Is it up-to-date?	No	No
Has the client been advised to make a will?	Yes	Yes
Are you currently in good health? If No, please provide details	Yes	Yes
Any medical conditions (including date diagnosed)?	Diabetes 11/2013 diet controlled, all ok at last check 11/2018	
Are you a smoker?	No	No
Have you smoked in the last 12 months?	No	No
UK Domicile?	Yes	Yes
UK Residency?	Yes	Yes
Expatriate?	No	No
Place of Birth	England	England
Power Of Attorney Granted?	No	No

Address Details

Addressee	Nigel Roberts	Nigel Roberts	Jane Roberts
Address Line 1	13 Thrapston Road	16 School Lane	13 Thrapston Road
Address Line 2	Finedon	Islip	Finedon
Address Line 3			
Address Line 4			
City / Town	Wellingborough	Kettering	Wellingborough
County			
Country	United Kingdom	United Kingdom	United Kingdom
Postcode	NN9 5DG	NN14 3LQ	NN9 5DG
Address Type	Home	Home	Home
Residency Status	Owner Occupier - mortgaged	Owner Occupier - mortgaged	Owner Occupier - mortgaged
Date From		24/08/2018	
Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address Status	Previous Address	Current Address	Previous Address
Registered on Electoral Roll	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Time at Address (Months)		7	
Addressee	Jane Roberts		
Address Line 1	16 School Lane		
Address Line 2	Islip		
Address Line 3			
Address Line 4			
City / Town	Kettering		
County			
Country	United Kingdom		
Postcode	NN14 3LQ		
Address Type	Home		
Residency Status	Owner Occupier - mortgaged		
Date From	24/08/2018		
Default	<input checked="" type="checkbox"/>		
Address Status	Current Address		
Registered on Electoral Roll	<input type="checkbox"/>		
Time at Address (Months)	7		

Contact Details

Name	Contact Type	Value	Note	Preferred Contact
Nigel Roberts	Mobile	07801 833878		Yes
Nigel Roberts	E-Mail	nigel@nrgroundworks.co.uk		Yes
Jane Roberts	Mobile	07715 898205		Yes
Jane Roberts	E-Mail	jane@nrgroundworks.co.uk		Yes

Professional Contacts

Contact Type	Accountants		
Contact Name	Jon Essam		
Company Name	Jon Essam & Co		
Address Line 1	23 Cottingham Way		
Address Line 2	Thrapston		
Address Line 3			
Address Line 4			
City Town	Kettering		
Post Code	NN14 4PL		
Telephone Number			
Facsimile Number			
Mobile Number			
Email Address			
Permission to Contact?	Permitted		
Contact providing source of funds?	No		

Family And Dependants

Full Name	Date of Birth	Age	Relationship	Related To	Financially Dependant?	Period	Dependant Living with Client(s)
Matthew Roberts	10/02/1999	20	Son	Joint	No		Yes
Rebecca Roberts	10/02/1999	20	Daughter	Joint	No		Yes