



KNIGHT HAYES  
Private Client Services

## Wealth Planning Report

Prepared For: Mr. John Doe

Prepared By: Mike Foster-Dalporto Principal - KNIGHT HAYES PCS

KNIGHT HAYES PCS is an appointed representative of Abana Lda which is authorised by the Instituto de Seguros de Portugal for business conducted for resident outside the United Kingdom (UK)

16<sup>th</sup> October 2017

## Wealth Planning Report

---

A Thank You

Dear John,

Thank you for approaching us to review your current circumstances and provide you with some suitable solutions to achieve your goals and objectives. The following provides a summary of our discussions to date, which reflects upon both wealth-structuring considerations, as well some recommendations for your investment portfolio. If you feel I have missed anything or you wish to make any amendments, please let me know so we can review accordingly.

I look forward to discussing matters further soon.

Best Regards,  
Mike Foster-Dalporto

ceffe: wefc

asdfasdf: cfh

asdasd: N/A

Boss abrikos