



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)

16th 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

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