

- STRICTLY CONFIDENTIAL -

Personal details	You	Your partner
Last name		
First names		
Address 1		
Address 2		
Village		
Town		
Postcode		
Country		
Telephone number (with country code)		
Mobile number (with country code)		
Date of birth		
Country of actual permanent residence		
Second country of temporary visits		
Expected date of fiscal residency		
Start date of French residency		
Date permanent residency notified to fiscal authorities		
Date of marriage/civil partnership and country in which first 2yrs spent		
Country of marriage/civil partnership and country in which first 2yrs spent		
Marital status:		
single:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
cohabitation:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
civil partnership + country obtained	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
married (state if 1st, 2nd etc):	<input type="checkbox"/> Yes #:	<input type="checkbox"/> Yes #:
divorced:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
widowed:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Number of children		
If married: number of children outside current marriage		

This information will in all probability be required in order to deal with your enquiry. In all instances, the first section containing personal details **must** be completed, and the income and assets sections completed as required.

Income	You	Your partner
Past/current profession/trade (please state even if retired)		
Activity :		
self employed	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
employee - for another company	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
employee - for your own company	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Retired, with : pension annuity	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
private pension	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
company pension	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
government pension	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
state old age pension	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
not drawing a pension	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Average estimate of annual FOREIGN (non-French) gross (pre-tax) income		
Tax free income	€ :	€ :
All interest and PB winnings (net)	€ :	€ :
dividends from shares and UTs (even if reinvested) (net)	€ :	€ :
rental income - furnished	€ :	€ :
rental income - unfurnished	€ :	€ :
life assurance Investment Bond withdrawals	€ :	€ :
annuity, private, and company pensions	€ :	€ :
government pension (NHS, teaching, forces etc)	€ :	€ :
old age state pension	€ :	€ :
employment income (from your own company or other)	€ :	€ :
self employment income	€ :	€ :
Average estimate of annual FRENCH gross (pre-tax) income		
Tax free interest	€ :	€ :
bank interest	€ :	€ :
dividends from shares (even if reinvested)	€ :	€ :
rental income - furnished	€ :	€ :
rental income - unfurnished	€ :	€ :
life assurance Investment Bond withdrawals	€ :	€ :
employment income (from own company or other)	€ :	€ :
self-employment income	€ :	€ :

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Assets	You	Your partner
Expected values of :		
home	€ :	€ :
second home	€ :	€ :
other private property	€ :	€ :
property specifically bought to rent	€ :	€ :
contents of all properties	€ :	€ :
private possessions, chattels and jewelry	€ :	€ :
works of art (older than 100 years)	€ :	€ :
vehicles	€ :	€ :
yachts, moorings, planes, etc.	€ :	€ :
foreign bank current account	€ :	€ :
foreign bank deposit accounts, NS and Premium Bonds	€ :	€ :
foreign shares and unit trusts...	€ :	€ :
foreign PEPs/ISAS and other tax free accounts	€ :	€ :
foreign life assurance Investment Bonds	€ :	€ :
foreign endowments plans	€ :	€ :
foreign life insurance policies	€ :	€ :
foreign pension plans	€ :	€ :
french bank current accounts	€ :	€ :
french taxable bank deposit accounts	€ :	€ :
french tax free bank deposit accounts	€ :	€ :
french shares	€ :	€ :
french life assurance 'assurance vie' contracts	€ :	€ :
french wealth tax exempt investments	€ :	€ :
other	€ :	€ :

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Your enquiry	You	Your partner
Country concerned :		
France	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Britain	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
USA	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Canada	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Australia	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
New Zealand	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Other (please specify) :
Taxes or charges concerned :		
Taxe foncière, taxe d'habitation	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Income tax	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Social charges, national insurance	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Capital Gains tax	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Wealth tax	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Inheritance tax	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Succession law, inheritance, wills, donations	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Marriage regimes, civil pacts, cohabitation	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Healthcare, state and private	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Titre de séjour', driving licences, etc	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Income protection	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Endowments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Life insurance	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Mortgages and finance	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Pensions	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Savings	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Investments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Establishing fiscal residency, tax return preparation	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Life assurance investments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
Defiscalisation' schemes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

Please fax or mail the completed form to the above number/address.

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