

**Client- ID:**

## Questionnaire

Name, Firstname: \_\_\_\_\_

Street: \_\_\_\_\_

Postcode/town: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Investment made with Phoenix Kapitaldienst GmbH (date): \_\_\_\_\_

Investment made (include details of payments w date, excl. interest and returns):

€ \_\_\_\_\_

Investment capital (based on the last statement dated \_\_\_\_\_): € \_\_\_\_\_  
(if in a different currency: currency and amount: \_\_\_\_\_)

Payments received (include dates)

€ \_\_\_\_\_

This investment was brokered for me by: \_\_\_\_\_

I have insurance for legal expenses [ ] yes [ ] no

Insurer: \_\_\_\_\_

Policy number: \_\_\_\_\_

Insured since: \_\_\_\_\_

Please include **copies of the following documents** (please do not send originals!!!)

- investment contract
- last statement from Phoenix Kapitaldienst GmbH
- brief description of why you made this particular investment, how it was brought to your attention etc.