



Source of Wealth. We do not have your complete Source of Wealth information on file. Source of Wealth pertains to how you accumulated your overall wealth (e.g., employment income, inheritance, sale of property, etc.). Please log in to the Client Portal/Account Management and include the corresponding percentages for each type of Source of Wealth selected. Note that the total percentage under Source of Wealth must add up to 100%.

For each Source of Wealth listed, please provide appropriate supporting documentation. We provide a list of acceptable supporting documents below:

Types of Source of Wealth	Supporting Documents Required (One of the below points)
Allowance/ Spousal Income	<ul style="list-style-type: none"> • Bank Statement showing the partner's payments
Disability/ Severance/ Unemployment	<ul style="list-style-type: none"> • Government-issued letter detailing benefit; or • Bank statement showing receipt of benefit.
Income from Employment	<ul style="list-style-type: none"> • Payslips; or • Bank Statement showing the salary/bonus payments; or • Employer's confirmation of salary/bonus on employer's letterhead.
Inheritance	<ul style="list-style-type: none"> • Grant of Probate (with a copy of the Will); or • The Will; or • Solicitor's confirmation of the details on letterhead.
Gift	<ul style="list-style-type: none"> • Letter from a solicitor confirming date of the gift, grantor's name and total amount received; or • Evidence of Grantor's wealth.
Divorce settlement	<ul style="list-style-type: none"> • Court Order; or • Letter from a solicitor detailing divorce settlement.
Company Sale	<ul style="list-style-type: none"> • Contract of Sale; or • Letter from a solicitor or accountant confirming address of the property sold, date of sale, name of buyer and amount received.
Interest/Dividend Income	<ul style="list-style-type: none"> • Bank statement showing receipt of funds; or • Broker statement showing financial instruments details, including interest/dividend.
Market Trading Profits / Sale of Investment	<ul style="list-style-type: none"> • Investment/Savings certificates; or • Bank statement showing receipt of funds; or • Accountant's confirmation of the funds received, date of funds receipt on letterhead.
Pension/Government Retirement Benefit	<ul style="list-style-type: none"> • Government-issued letter detailing pension/benefit; or • Bank statement showing receipt of pension/benefit.
Sale of Property	<ul style="list-style-type: none"> • Sale Contract; or • Letter from a solicitor or accountant confirming address of the property sold, date of sale, name of purchaser and amount received.