

<i>Personal Details</i>	
Your Full Name:	
Your DOB:	
Your Partners Full Name:	
Your Partners DOB:	
Your Children's First Names & Ages:	
Contact Phone Numbers:	
Your E-mail Address:	
<i>Asset Value</i>	
Home:	\$
Cash Savings:	\$
Investment Property/Properties:	\$
Shares:	\$
Managed Funds:	\$
Unit Trusts:	\$
Superannuation Funds:	\$
Business Shares/Assets:	\$
Other:	\$
Total Assets:	\$
<i>Liabilities</i>	
Home Loan	\$
Car Loan:	\$
Investment Property/Loans:	\$
Other:	\$
Total Liabilities:	\$
<i>Inheritances (If any)</i>	
Yourself:	\$
Your Spouse:	\$

Annual Income

Salary Package:	Cash	\$
	Car:	\$
	Superannuation:	\$
	Other:	\$
Spouses Income:		\$
Dividend Income:		\$
Rental Income:		\$
Interest Income:		\$
Annual Bonuses:		\$
Other Income:		\$
Total Annual Income:		\$

Annual Expenses

Loan repayments:		\$
House Shopping:		\$
Education:		\$
Transport:		\$
Health:		\$
Personal:		\$
One Off expenses:		\$
Other:		\$
Total Annual Expenses:		\$

Estate Planning Details

Current Wills In Place?	
Last Reviewed?	
Powers of Attorney In Place?	
Enduring? Held by?	

Your Financial Objectives?

It would help us if you give a little thought to the following matters. Take some notes to record these thoughts in the space provided.

- 1 What would you like to achieve in your personal financial situation over the next 5 years?**

- 2 What is it that currently concerns you about your financial position?**

- 3 When do you anticipate that you and/or your partner will retire?**

- 4 What do you want to do when you retire, and where do you want to live?**

5 *How important is it to you to adjust your lifestyle in your retirement (if applicable) so that you can leave assets to your children, or do you prefer to achieve those personal goals which you have deferred until retirement in priority to worrying about the size of your estate?*

6 *How familiar do you really feel with investment issues, the terminology used by investment professionals, the type of products available – and how these products actually operate?*

7 *How familiar do you really feel with superannuation – how it is taxed, what you can contribute, the sorts of products which are available, and the terminology used?*

Do you feel comfortable in your understanding of the choices available for superannuation savings and/or the retirement income options?

8 *How much information would you like in order to understand more, in what areas, and how simple or more complex you would like that information to be?*

9 *How is that information best delivered to you?*

10 *How much risk are you prepared to accept when it comes to investing? Are you comfortable that you understand the types of risk that there are? If not, what would you like explained?*

11 *Things you would like to do now?*

12 *Things you would liked to do later?*

13 Please tick issues below that you are concerned about.

Please Indicate Choice In Shaded Areas

	Issue	✓
1.	Are you concerned about your General lifestyle:	
	Pre-retirement?	
	Post-retirement?	
2.	Children:	
	Funding	
	Education	
	Raising	
3.	Holidays - do you want to save for a specific holiday/s?	
4.	Do you want to upgrade your motor vehicles? How often? ()	
5.	Home/Property	
	Acquisitions?	
	Upgrade?	
	Downgrade?	
6.	Debt/Mortgage	
	Reduction	
	Consolidation	
7.	Are you worried about your estate?	
8.	Beneficiaries	
	Husband/Wife/Partner	
	Children	
	Others	
9.	Superannuation	
10.	Do you pay too much tax?	
11.	Can you never seem to save enough money?	
12.	Marital/Partnership Breakup?	
13.	Are you about to receive a redundancy payment?	
14.	Do you have enough Insurance?	
15.	Increase Income	
16.	Borrowing to Invest, a tax effective strategy to increase wealth (Shares Managed Funds Property)	
Are there any other issues you'd like us to consider?		