

Your Financial Health

Details			
Name		Phone Number	
E-mail Address			
<p>We request your e-mail address to keep you up-to-date with changes you need to be aware of in relation to products/services and terms and conditions. From time to time, we may also send you information about special offers that may suit your needs. If you do not wish to receive communication via email, please tick this box to opt out <input type="checkbox"/></p> <p>Alternatively, you may unsubscribe at any time via the links located on the bottom of the newsletter.</p>			

This information will allow us to tailor our services to your personal needs			
<input type="checkbox"/> Employed	<input type="checkbox"/> Self-employed	<input type="checkbox"/> Business owner	<input type="checkbox"/> Home duties
<input type="checkbox"/> Unemployed	<input type="checkbox"/> About to retire	<input type="checkbox"/> Retired	
Current income:	\$	pa	

A. Shares and Managed Funds		
Do you hold any investments in shares or managed funds?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you own managed funds, are you happy with the ongoing service you are receiving from the adviser who helped you establish this investment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

B. Wealth Creation – Regular Savings		
Would you be interested in using your tax refund to start a savings plan?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you interested in creating a tax effective savings plan using borrowing?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

C. Wealth Protection		
Could your household maintain its current standard of living if the main source(s) of income ceased due to illness or accident?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If either you or your partner were to die, do you have a strategy in place to ensure the surviving partner and any dependants will not be left financially disadvantaged?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

D. Superannuation		
Does your employer allow you to select where your superannuation is invested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you aware of how your superannuation is invested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you comfortable you will have sufficient funds for retirement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Your Financial Health



E. Save Tax and Lease a New Car

Would you be interested in learning how to save tax and salary sacrifice to lease a new car?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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F. Home Lending

Are you looking at purchasing an investment property for tax reasons?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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If you have a home loan:	Loan amount:	\$	Interest rate:	%
	House value:	\$		

G. Estate Planning

Do you have a valid and up-to-date Will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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Do you have an Enduring Power of Attorney?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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H. Planning for Your Future

Please list three areas where we can help to ensure you are comfortable with both your current and future financial position?

1.	
2.	
3.	