

Your Details

Name: _____ DOB: ___ / ___ / ___

Name: _____ DOB: ___ / ___ / ___

Address: _____

Contact: Ph: (Mob) _____ Hm: _____ Wk: _____

Email: _____

Occupation/s: _____

Dependents: Name: _____ / ___ / ___ Name: _____ / ___ / ___

Name: _____ / ___ / ___ Name: _____ / ___ / ___

What prompted you to seek advice?

What are the key triggers that prompted you to seek advice and information at this time?



- Control** – gain greater control & understanding of my current finances
- Change** – in personal circumstances. eg marriage, starting family, new job, retirement etc
- Review** – existing super, investments, Centrelink benefits, loans & personal insurance
- Estate** – discuss Wills and Powers of Attorney
- Refinance** – existing loans
- Superannuation** – contributions, returns, fees, investment mix, insurance etc
- DIY** – consider establishing a Self Managed Super Fund
- Risk** – insurance and assessment – eg salary, trauma, disability, death etc
- Retirement** – income strategies to; Age Pension, income streams & investments
- Budgeting** – managing cashflow, control spending, save more
- Age Care** – assess age care accommodation options for family member
- Property** – purchase home or investment property
- Other** _____



Where are you going?

Writing down your goals can be a great first step towards achieving them...

My SHORT TERM GOALS (1-5 years) 1. _____

2. _____ 3. _____

My MEDIUM TERM GOALS (6-20 years) 1. _____

2. _____ 3. _____

My LONG TERM GOALS (21 + years) 1. _____

2. _____ 3. _____

Where are you at ... right NOW?

Take a few moments now to summarise your current financial position:

PERSONAL ASSETS (Insert "best estimate" value where applicable. Further detail can be provided later if required)

Home: \$ _____ Property: \$ _____ Car/s: \$ _____

Other: _____

INVESTMENT ASSETS *(Cash, shares, managed funds etc and ownership detail)*

SUPERANNUATION ASSETS *(Fund name, ownership, balance & contributions. PLUS Investment Choice if known)*

LOANS & LIABILITIES *(Loan balance, repayments & interest rate. PLUS original purpose of loan)*

SALARIES & REMUNERATION *(Taxable salary, super contributions, employer super g'tee, pensions PLUS other remuneration)*

LIVING EXPENSES & LUMP SUM COSTS *(Usual living expenses, extra living expenses, PLUS planned lumpsum costs)*

WILLS & POWERS OF ATTORNEY

Are your Wills & Powers of Attorney up-to-date?

YES NO



Would you like to review your Wills & Powers of Attorney?

YES NO

PERSONAL INSURANCE *(Life, disability, trauma, salary continuance, health etc. Insurance coverage within super)*

NOTES
