Your Financial Health

Specialised Business Solutions

Details

Name _____ Phone Number _____

E-mail Address _____

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 ☐ *Alternatively, you may unsubscribe at any time via the links located on the bottom of the newsletter.*

This information will allow us to tailor our services to your personal needs

☐ Employed ☐ Self-employed ☐ Business owner ☐ Home duties

☐ Unemployed ☐ About to retire ☐ Retired

Current income: $ _____ pa

A. Shares and Managed Funds

Do you hold any investments in shares or managed funds? ☐ Yes ☐ 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? ☐ Yes ☐ No

B. Wealth Creation – Regular Savings

Would you be interested in using your tax refund to start a savings plan? ☐ Yes ☐ No

Are you interested in creating a tax effective savings plan using borrowing? ☐ Yes ☐ 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? ☐ Yes ☐ 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? ☐ Yes ☐ No

D. Superannuation

Does your employer allow you to select where your superannuation is invested? ☐ Yes ☐ No

Are you aware of how your superannuation is invested? ☐ Yes ☐ No

Are you comfortable you will have sufficient funds for retirement? ☐ Yes ☐ No

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? ☐ Yes ☐ No

F. Home Lending

Are you looking at purchasing an investment property for tax reasons? ☐ Yes ☐ No

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? ☐ Yes ☐ No

Do you have an Enduring Power of Attorney? ☐ Yes ☐ No

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. _____

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