



FINANCIAL PLANNING CLIENT DATA COLLECTION

APPLICANT 1

Surname:

First name: Middle Name:

Are you renting: Yes No Rental Amount:

Current Address:

State: Postcode:

Date moved in:

Postal Address:

State: Postcode:

Date of Birth:

Country of Birth:

Marital Status: Date of Marriage

TFN number:

Are you an Australian Resident? Yes No

Have you previously seen an adviser? Yes No
if so please provide details

Name:

Driver's Licence No: Expiry Date:

Date of Issue: State:

Medicare Card No: Expiry Date:

Mobile No:

Home Phone No:

Email:

No. of Dependants: Ages:

Name: DOB:

Name: DOB:

Name: DOB:

Name: DOB:

Smoker: General Health:

Hobbies:

APPLICANT 2

Surname:

First name: Middle Name:

Are you renting: Yes No Rental Amount:

Current Address:

State: Postcode:

Date moved in:

Postal Address:

State: Postcode:

Date of Birth:

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Smoker: General Health:

Hobbies:

CURRENT EMPLOYMENT

Occupation:

Name of Employer:

Employer Address:

Phone No: Start Date:

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Occupation:

Name of Employer:

Employer Address:

Phone No: Start Date:

Do you have private health insurance? (if Yes) Yes No

What Policy Number?.....

Amount per Month.....

Details of any major surgery?.....

Do you have a will? Yes No

What is the date of it?.....

Where is it located?.....

Who is the executor of the will?

Do you have granted powers of attorney? Yes No

Do you have a health care directive? Yes No

Have you nominate a beneficiary for your super? Yes No

Name of who you have nominated?.....

Who is your super with?

What is the policy number?.....

Do you have life insurance? Yes No

Who is it with?.....

Policy number:.....

Do you have income protection? Yes No

Who is it with?.....

Policy number:.....

Do you have trauma cover? Yes No

Who is it with?.....

Policy number:.....

What are you seeking advice for?

Salary Sacrificing Yes No

Super Yes No

Investment Advice Yes No

Retirement Yes No

Transition to Retirement Yes No

Wealth Protection Yes No

Tax Minimisation Yes No

Estate Planning Yes No

Budget and Debt Management Yes No

Cash Flow Management Yes No

Complete Business Succession Plan Yes No

Buy Sell Agreement Yes No

Ongoing Review of your Investments and Financial Plan Yes No

Wealth Creation Yes No

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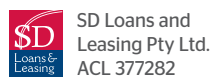
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