|  |  |  |  |
| --- | --- | --- | --- |
| 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* □ | | | |

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| 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** | **Out of 1 to 5 how urgent do you want to get your financial health in check. 5 is urgent and 1 not so urgent** □ |
| **Current income:** | **$** | **pa** | |

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| 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 financial adviser who helped you establish this investment?** | □ Yes | □ No |

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| 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 |

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| 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 |

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| --- | --- | --- |
| 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 |

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| 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 |

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| 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:** | % | |
|  | **Investment value:** | $ | **ownership** |  |  |
| **If you have an Investment loan:** | **Loan amount:** | $ | **Interest rate:** | % | |
|  | **Investment value:** | $ | **ownership** |  |  |
| **If you have an Investment loan:** | **Loan amount:** | $ | **Interest rate:** | % | |
|  | **Investment value:** | $ | **ownership** |  |  |
| **If you have an Investment loan:** | **Loan amount:** | $ | **Interest rate:** | % |  |
|  | **Investment value:** | $ | **ownership** |  |  |

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| --- | --- | --- |
| Estate Planning | | |
| **Do you have a valid and up-to-date Will?** | □ Yes | □ No |
| **Do you have an Enduring Power of Attorney?** | □ Yes | □ No |

|  |  |
| --- | --- |
| 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.** |  |

Please email your completed forms to Kim Dinh at [grow@successaccountinggroup.com](mailto:grow@successaccountinggroup.com).au and suggested appointment time and date. If you qualify, we will schedule an appointment to have a 30 minute chat with Lan Nguyen our Wealth strategist.