

	Title	First Name	Middle Name	Surname	Sex	DOB	Tax File Number (TFN)
1							
2							
Risk Profile							
Marital Status							
Private Health Insurance							
State of Health							
Children/Dependents							

Contact Details		
	Client 1	Client 2
Street 1		
Street 2		
Suburb, State & Postcode		
Phone (w)		
Phone (h)		
Phone (m)		
Fax		
Email (primary)		
Email (secondary)		

Employment Details		
Employment Status		
Occupation		
Salary		

Compliance		
Date FSG Provided		
Date of AML		

Investment Assets incl Rental Properties / Blocks / Shares

Investment Assets Non-Superannuation	Owner	Current Value	Purchase Date (For Real Estate)	Purchase Price (\$) (For Real Estate)	Regular Investment (pa)	Withdrawals (pa)
Total						

Investment Assets Superannuation / AP's	Current Value	Owner	Components	Super Contributions (pa)	AP Drawdowns (pa)
Total					

Lifestyle Assets Including Residence

Owner (Select one only)		Description	Current Value (\$)
Client	Spouse		
x		Suburu Forrester 2001 (EXAMPLE)	\$ 7,000
		Residence Purchase Date:	

Liabilities and Mortgages

Liability (incl Credit Cards)	Limit (\$)	Balance (\$)	Owner	Lender	Investment / Personal (I / P)	Secured On	Interest Rate (%) (Variable / Fixed) (V / F)	Repayment (\$)
Total								

Wills, Powers of Attorneys and Estate Planning		
	Person 1	Person 2
Date of Last Will (where held)		
Date of Power Of Attorney (where held)		
Importance of Estate Planning		
If you have minor children and/or large mortgages have you considered what would happen if you were unemployed, disabled or on death		

Insurance

Policy Type	Level of Cover	Insured	Premium

Objectives

Entity	Objective Description
	Short Term Objectives < 3 Years
	Medium Term Objectives 4 years - 6 Years
	Long Term Objectives > 6 Years

Other Info Comments
