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Helping You Become Financially Well Organized.

If you would like to discuss these issues please email us a copy prior to when your tax return is prepared. Alternatively, please complete this form and bring it with you when you come to see your Tax Agent.

First Name:	Last name:
Date:	
Contact Number (Home):	Mobile:
Email Address:	
Date of Birth:	

1) Do you think you are currently paying too much tax?

☐ No ☐ Yes ☐ Unsure

2) Do you have income protection or life insurance?, if so has it been recently reviewed?

☐ No ☐ Yes ☐ Unsure

3) Are you satisfied with the return from your bank accounts?

☐ No ☐ Yes ☐ Unsure

4) Do you know the amount of assets you would need to meet your retirement income needs?

☐ No ☐ Yes ☐ Unsure

5) Are you satisfied with the returns of your super funds? Amount

☐ Satisfied ☐ Not Satisfied ☐ Unsure $

6) Do you think you will need to supplement your retirement income needs with government benefits?

☐ No ☐ Yes ☐ Unsure

7) Is your mortgage substantially or fully paid off? and can you tell us what your current loan interest rate is?

☐ No ☐ Yes ☐ Unsure Rate %_____ Mortgage $

8) In event of an accident, how confident are you that your estate will be distributed according to your wishes?

☐ Very Confident ☐ Not Confident ☐ Unsure

9) Do you intend to purchase a property for personal or investment purpose?

☐ No ☐ Yes ☐ Unsure