



Do you know how much income you will need to live on when you retire?  Yes  No

Do you have employees enrolled in a Corporate Superannuation?  Yes  No

If Yes, where is the employer enrolled? \_\_\_\_\_

How many years until you plan to retire? \_\_\_\_\_

### E. Staying in financial control

How often are your current investments reviewed? \_\_\_\_\_

Are you happy with your current financial adviser?  Yes  No

Would you be interested in having consolidated reporting for your current investments at no charge?  Yes  No

### F. Business Owners – Leasing & Asset Purchase

Do you currently lease any equipment or vehicles?  Yes  No

What are your current monthly repayments? \$ \_\_\_\_\_

Are you planning to finance motor vehicles or equipment in the next 12 months?  Yes  No

Are you aware that our firm can provide up to 4 competitive finance quotes?  Yes  No

### G. Home Lending

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

Do you have a home loan?  Yes  No

What is your current interest rate? \_\_\_\_\_

What are your current monthly repayments? \_\_\_\_\_

Are you aware that our firm can offer very competitive Home Loans for our clients?  Yes  No

### Notes:

#### *Follow up Action: (to be completed by Accountant)*

Client would like a contact:  Yes  No - invite client to information session on / / 20

Best Time to contact:  am  pm Date \_\_\_\_\_

Best Location to contact:  Home  Work  Mobile