



Personal Profile Discussion Sheet

Personal Details

You		Partner	
Name:			
DOB:			
Occupation:			
Address:			
City/Suburb:		Postcode:	
Phone Home:	Work:	Mobile:	
Email:			
Dependents: Y/N	How many?	Ages	

Goals & Objectives

Current savings ability per month: \$	Desired savings per month: \$
My Investment objective is:	
Provide an after tax income of: \$	now/retirement
Provide capital growth of:	%, or in line with inflation (subject to investment profile)
Maintain a readily accessible cash account of: \$	for emergencies
Do you have any other goals or desires (eg holiday, new car, pay off mortgage etc)?	

Income & Expenditure

Your annual salary: \$	Partner's annual salary: \$
Other income (approx) : \$	
Estimated annual expenditure: \$	

Assets, Liabilities & Wealth Protection

Principal Residence - Estimated value: \$	Mortgage balance: \$
Personal loans & other liabilities: \$	
Exiting Investments - Property: \$	Shares: \$
Managed funds: \$	Term deposits & cash: \$
Other: \$	
Superannuation - Provider 1:	Value: \$
Investment choice selected:	
Superannuation - Provider 2:	Value: \$
Investment choice selected:	
Wealth protection - Type: Life / TPD / Income Protection / Trauma	Value: \$
Type: Life / TPD / Income Protection / Trauma	Value: \$
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Please detail anything else you think may be relevant	