

About You



Date Completed

This information was prepared by: _____

General	You	Your Partner
First name:		
Family name:		
Gender:		
Date of birth:		
Mobile:		
Email:		
Relationship status:		

Children	Gender	Date of birth

Home owner			
Address			
Suburb		Post code	
Home value			
Mortgage balance			
Mortgage repayment (monthly)			

Renting			
Address			
Suburb		Post code	
Rental payments (monthly)			

Assets	Value	Debt balance (Associated)
Property		
Shares		
Managed funds		
Savings		
Other		

Other debts	Balance
Personal loan	
Credit card	
Lease	
Other debts	

Superannuation/Pension	You	Your Partner
Number of accounts		
Balance		
SMSF	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO

Personal insurance	You	Your Partner
Death		
Permanent disablement (TPD)		
Trauma		
Income protection (monthly)		

Employment	You	Your Partner
Employed/self-employed		
Occupation		
Annual income (excl. super)		
Desired retirement age		

Expenses	
Do you regularly track your expenses?	
Living expenses:	
How much are you saving?	

General question	
How do you describe your knowledge about personal finances?	
Have you ever taken any professional advice on managing your finances?	
Do you feel your estate planning affairs are in order?	
Do you own have any interests in private companies or trusts?	

Specific discussion points