

### 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