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# C o n f i d e n t i a l

## FINANCIAL HEALTH CHECK

The following 15 questions are a quick easy way to identify what areas of your finances could benefit from more attention, and can be used as a kick-start to discussions of your financial situation with your Financial Adviser. **Once done, please email back to [tracey@skyacc.com.au](mailto:tracey@skyacc.com.au) or call **1300 328 855** for assistance.**

First Name		
Surname		
Contact Number	<i>(hm)</i>	<i>(mob)</i>
Email		
Date of birth		
Date Completed		

**Question 1:** *Do you think you are currently paying too much tax?*  
 1. No                    2. Yes

**Question 2:** *Are you interested in Long Term Wealth Generation & Protection?*  
 1. No                    2. Yes

**Question 3:** *Do you have any regular savings plan in place?*  
 1. No                    2. Yes

**Question 4:** *Are you satisfied with the return from your bank accounts?*  
 1. No                    2. Yes

**Question 5:** *Do you know the amount of assets you would need to meet your retirement income needs?*  
 1. No                    2. Yes

**Question 6:** *Are you satisfied with the returns of your super funds?*  
 1. Satisfied            2. Not Satisfied

**Question 7:** *Do you think you will need to supplement your retirement income needs with government benefits?*

1. No            2. Yes

**Question 8:** *Is your mortgage substantially or fully paid-off?*

1. No            2. Yes

**Question 9:** *In the event of an accident, how confident are you that your estate will be distributed according to your wishes?*

1. Confident    2. Not Confident

**Question 10:** *Do you intend to purchase a property for personal or investment purpose?*

1. No            2. Yes

**Question 11:** *In event of an accident, how confident are you that there is sufficient assets/insurance to cover the financial needs of you and your family?*

1. Confident    2. Not Confident

**Question 12:** *Do you have a current Will?*

1. No            2. Yes

**Question 13:** *How long could you or your family survive financially if you couldn't go to work?*

1. 14 days      2. 30 days      3. 90 Days      4. 180 days

**Question 14:** *If you save as much in the next 10 years as you have in the last 10 years will you be happy?*

1. No            2. Yes

**Question 15:** *Do you see yourself as a risk taker?*

1. No            2. Yes

*Thank you. We look forward to spending time developing your own financial plan to ensure that you are on track to reach your goals.*

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