Your Financial Checklist

STATE SUPER **Financial Services** AUSTRALIA

To ensure that you receive the financial advice that best suits your needs, we will need to collect personal information relating to your current financial situation. Our Privacy Policy describes how we manage the personal information you provide to us. You may obtain a copy of our policy from any of our offices, or online at www.ssfs.com.au

Please ensure both sides of this checklist are completed prior to your appointment.

Date:

PERSONAL DETAILS — *Please Print*

	Client Details:	Partner Details:
Full Name:		
Date of Birth:		
Employer:		
E-mail address:		

Contact Numbers: Home: Work: Mobile:

ASSETS

Family Home:	$
Home Contents:	$
Motor Vehicles:	$
Caravan / Boat / Trailer:	$
Holiday Home / Land:	$

LIABILITIES

	Monthly Payment	Interest Rate %
Home Mortgage:	$	
Investment Loans:	$	
Credit Cards:	$	
Other Loans:	$	
Other Loans:	$	

EXISTING INVESTMENTS

		Details	Owner
Cash at Bank:	$		
Term Deposits:	$		
Shares:	$		
Managed Funds:	$		
Investment Property:	$		
Other:	$		

ANNUAL INCOME

	Client Details:	Partner Details:
Salary:	$	$
Rental:	$	$
Super Pensions:	$	$
Interest / Dividends:	$	$

Continued Overleaf

TAKE HOME PAY

An important factor in giving financial planning advice is determining the amount of money needed to meet your future lifestyle requirements. Your current take home pay is a good starting point in these calculations.

	Client:	**Partner:**
Take home pay: *(minus tax and super contributions)*	$	$

SUPERANNUATION ENTITLEMENTS

	Client Details:			**Partner Details:**		
Name of Fund(s):						
Gross Benefit or Pension:	$			$		
Do you currently salary sacrifice?	Yes / No	Amount:	$ fn/pa	Yes / No	Amount:	$ fn/pa

IF YOU ARE FINISHING WORK

	Client Details:	**Partner Details:**
Possible finishing date:		
Annual Leave:	$	$
Long Service Leave:	$	$
Redundancy Payment:	$	$

PLANNED MAJOR EXPENSES

Purpose	Amount	Year Planned
	$	
	$	
	$	

FINANCIAL GOALS, OBJECTIVES OR ISSUES YOU WISH TO DISCUSS

____

____

____

____

____

____

Checklist: Please ensure you bring the following items (where applicable) with you to your appointment.

Payslip:	☐	Superannuation Statement/Benefit Estimate:	☐
Redundancy Details:	☐	Details of existing investments:	☐