

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



Lifespan Financial Planning Pty Ltd ABN 23 065 921 735

Australian Financial Services Licence No 229892

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.

First Name	
Surname	
Contact Number	(hm) <input type="text"/> (mob) <input type="text"/>
Email	<input type="text"/>
Date of birth	<input type="text"/>
Date Completed	<input type="text"/>

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

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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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