



Australian Financial Services License Number 244565  
ABN 54 007 375 420

## Financial Health Check

### Your details

Title \_\_\_\_\_ Surname \_\_\_\_\_  
Given Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Gender \_\_\_\_\_ Marital Status \_\_\_\_\_

### Dependants

Number of Dependants \_\_\_\_\_ Children living at home  
\_\_\_\_\_ Children living away from home

### Contact Details

Address \_\_\_\_\_  
\_\_\_\_\_

State \_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

Telephone (please check box of preferred contact number)

(b) \_\_\_\_\_

(h) \_\_\_\_\_

(m) \_\_\_\_\_

Preferred contact time \_\_\_\_\_

### Please enter your reasons for seeking advice

What are the main reasons for seeking advice?

1. \_\_\_\_\_

2. \_\_\_\_\_

Security National Financial Services Pty Ltd

Level 2, 608 St Kilda Rd, Melbourne, VIC 3004

PO BOX 6160 St Kilda Rd Central, Melbourne, VIC 3004

What lifestyle objectives are important to you?

1. \_\_\_\_\_

2. \_\_\_\_\_

What issues or events may affect your lifestyle objectives over the next five years (eg starting a family?)

1. \_\_\_\_\_

2. \_\_\_\_\_

### Financial Questionnaire

Please answer **YES** or **No** to the following questions

1. Do you know what your financial goals are?

Yes       No

2. Do you have and work to a current financial plan to achieve your goals?

Yes       No

3. If you were injured or became ill and couldn't work how long could you and your family survive without income?

2 weeks    1 month    2 months    3 months    6 months    12 months

4. Would your family be financially secure if you were to die or become permanently disabled?

Yes       No

5. Do you understand how your superannuation is structured?

Yes       No

6. Are your investments/finances structured in the most tax effective manner possible?

Yes       No       Unsure

7. Do you know how much money you are likely to need to sustain your lifestyle when you retire?

Yes       No

8. If you are nearing retirement, do you have a workable plan for generating regular tax-effective income in the future when you retire?

Yes       No       N/A

9. Do you know how to minimise your taxation once you retire?

Yes       No

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