Financial details

	Client 1	Client 2
Name		
Address		
Date of birth		
Email		
Phone		

Dependants			
Name		Date of birth	
Name		Date of birth	
Name		Date of birth	
Name		Date of birth	

Financial / Lifestyle Goals

List top three financial priorities

Income and Expenses details

Income	Client 1	Client 2
Salary (excluding super)		
Business income		
Other		
Other		
Pension (from any source)		

Expenses	Client 1	Client 2
Estimated living expenses		

Assets and Liabilities

Assets	Owner	Value	Comments
Residence			
Investment properties			
Shares (value of portfolio)			
Superannuation			
Superannuation			
Superannuation			
Cash			
Other			
Other			
Total assets		$ 0.00	

Liabilities	Owner	Interest rate	Debt	Comments (repayments/month, P&I or Interest only)
Home loan				per month
Investment loan				per month
Other				per month
Total assets			$ 0.00	$ 0.00 per month

Insurance

Personal insurance	Policy 1	Policy 2	Policy 3
Type of cover (eg. Life, TPD)			
Amount of cover			
Annual premium			
Insurance Company			