Consultum: Getting to Know You - Key Financial Information

This questionnaire is designed to gather essential personal financial information and your goals to help us develop a financial strategy tailored to your needs.

Any advice we provide relies on the information you give us. Incomplete or inaccurate information may lead to inappropriate advice.

1. Personal Details

Please provide your basic personal information:

Detail	Client 1	Client 2
Title		
First Name		
Preferred Name		
Surname		
Date of Birth		
Marital Status		
Gender		
Health Status	☐ Poor ☐ Fair ☐ Good ☐ Excellent	☐ Poor ☐ Fair ☐ Good ☐ Excellent
Private Health Insurance	☐ Yes ☐ No	☐ Yes ☐ No

Contact Details: Please tick your preferred communication channels.

Detail	Client 1	Client 2
Home Address		
Postal Address		
Mobile	☐	☐
Email	☐	☐
Receive documentation via email	☐ Yes ☐ No	☐ Yes ☐ No

Dependants:

Name	Date of Birth	Relationship	Financial Dependant (Yes/No)	Support to Age
			☐ Yes ☐ No	
			☐ Yes ☐ No	
			☐ Yes ☐ No	

Future Changes to Your Situation:
Are you aware of any future changes that could impact your financial or personal situation, such as future study, career changes, or providing financial assistance to family?

2. Your Lifestyle and Financial Goals

Please list any lifestyle and financial goals you want to achieve. For financial goals, this could include funding education or retirement. Lifestyle goals might include saving for a holiday or home renovations.

Description	Owner (C1, C2, or J for Joint)	Amount	Target Date	Priority (1=High, 9=Low)

Please tick any priorities that are important to you and add others not listed.

- To be able to fund my children's education
- To review my superannuation accounts and fees
- To invest my inheritance
- To repay my liabilities as soon as possible
- To maximise my Centrelink or government benefits
- To increase wealth accumulation outside super (e.g., investment account)
- To minimise taxation (e.g., salary sacrifice)
- To protect my family in the event of my death or serious injury/illness
- To protect my income against sickness or trauma
- To be able to cover my medical costs in the event of a serious illness or trauma
- I want to be able to invest in direct equities
- I want to be able to invest in term deposits
- I want access to a wide range of investments
- I want a cash account to manage fees, investment distributions and withdrawals/payments
- I want to invest in socially and/or ethically responsible investments

3. Income and Expenses

Income:

Income Type	Client 1 ($)	Client 2 ($)
Gross salary		
Bonuses		
Investment income		
Gross rental income		
Centrelink payments		
Business income		
Super pension income		
TOTAL		

Expenses:

Expense Type	Total ($)
Living expenses	
Mortgage repayment	
Credit card repayment	
Insurance premiums	
TOTAL	

4. Assets and Liabilities

Assets:

Asset Type	Owner	Value ($)
Lifestyle Assets		
Family home		
Home contents		
Car 1		
Car 2		
Boat/caravan		
Land/holiday home		
Art work/jewellery		
Financial Assets		
Cash		
Term deposits		
Superannuation / Pension 1		
Superannuation / Pension 2		
Share portfolio		
Managed funds		
Investment property 1		
Investment property 2		

Liabilities:

Liability Type	Balance ($)	Interest Rate (%)	Owner	Repayment Amount ($)	Repayment Frequency
Mortgage					
Personal loan					
Credit card 1					
Credit card 2					
Investment loan					
TOTAL					

Acknowledgement:

I declare that the information provided in this form is complete and accurate to the best of my knowledge. I understand that if I do not provide full or accurate information, any advice given may be inappropriate for my needs.