All About You Questionnaire

Personal Details:

	Client	Partner
Title		
First Name(s)		
Surname		
Date of Birth		
Relationship Status		

Contact Information:

	Client	Partner
Residential Address		
Postal Address		
Home Phone		
Mobile		
Email		
Tax File Number		

Employment Information:

	Client	Partner
Employment Status (FT, PT, Casual)		
Occupation		

Asset Details:

	Client	Partner	Joint
Family Home			
Motor Vehicle			
Cash			
Term Deposits			
Managed Funds			
Shares			
Investment Property			

Liability Details:

	Client	Partner	Joint
Home Mortgage			
Margin Loans			
Investment Loans			
Personal Loans			
Credit Cards			

Superannuation:

	Client	Partner
Superannuation Fund		
Superannuation Balance		
Expected Retirement Age		
Desired Retirement Income (p.a)		

Note: Please bring a copy of your recent superannuation statement to our meeting.

Estate Planning:

	Client	Partner
Do you have a Will?		
Do you have a POA?		

All About You Questionnaire

Why Are you seeking tax advice?

Are there any pressing or specific issues you wish to discuss?

Other important information surrounding your situation…