

Where are you now?

Name: _____

DOB: _____

Address: _____

Postcode _____

Phone: (H) _____

(W) _____

(M) _____

(Email) _____

How would you prefer to receive the Patron Investor Report?

Email

Mail

Your current situation is:

You Employed Income \$ Business Owner Home Duties

Your Spouse Employed Income \$ Business Owner Home Duties

You Occupation: Retiring soon Retired Self-employed

Your Spouse Occupation: Retiring soon Retired Self-employed

A. Wealth Creation – regular savings

What is the current balance of your savings and where are you saving?

Company where saving	Amount saved	Interest rate	Maturity date (if applicable)
	\$		
	\$		
	\$		
	\$		
TOTAL	\$	-	-

B. Superannuation

Do you know your current Superannuation balance? Yes No

If yes, what is your balance? _____

Do you know if your investments suit your retirement needs? Yes No

Does your employer allow you to select where you superannuation is invested? Yes No

How many years until you plan to retire? Yes No

Do you know how much income you will need to live on when you retire? Yes No

C. Personal Insurance

- Is your family protected in the event of unexpected death, illness or injury? Yes No
- Is the income of your household protected in the event of injury or illness? Yes No
- Are you aware of what the correct amount of cover is for your circumstances? Yes No
- Are you aware that our firm can assist you with these needs? Yes No

D. Direct Investments

- Do you trade shares or have an interest in trading? Yes No
- Do you hold any stock(s)? Yes No
- Are you aware that we can assist you selling or purchasing shares? Yes No

E. Property Lending

- Do you have a home loan? Yes No
- What is the current interest rate? %
- What are your monthly repayments? \$
- Are you looking at purchasing a property shortly? Yes No
- Would you like us to assess all the strategies available to assist you in paying off your loan? Yes No
- Do you believe that your loan offers the most useful features for the lowest fees/interest rate? Yes No

F. Staying in financial control

- Are your investments reviewed? Yes No
- If yes, how frequently?
- Would you be interested in having consolidated reporting for your current investments at no charge? Yes No

G. Business Owners – leasing and asset purchase

- Do you currently lease any equipment or vehicles? Yes No
- What are your current monthly repayments \$
- Are you planning to finance motor vehicles or equipment in the next 12 months? Yes No
- Are you aware that our firm can provide fast finance and save you tax? Yes No

H. Notes/ Questions

Topics I would like to discuss at my initial meeting:

1.

2.

3.