

Your Financial Assessment

Name:_____

Phone:_____

Email:_____

YES () NO () *I have updated my retirement planning in the last 3 years*

YES () NO () *I have updated my life insurance in the last 3 years*

YES () NO () *My will is up to date*

YES () NO () *I have an enduring power of attorney*

YES () NO () *I have updated my critical insurance in the last 3 years*

YES () NO () *I have updated my disability insurance in last 3 years*

YES () NO () *My monthly cashflow is in good shape*

I am only interested in investing in

() *Growth investments*

() *Guaranteed investments*

() *Combination*

YES () NO () I have completed an investor profile in last 3 years

YES () NO () I still have a mortgage greater than \$75,000

YES () NO () I am confident that I am not over paying for home/auto insurance

YES () NO () I have interest in some estate planning

YES () NO () I have a need for tax advantaged investing

YES () NO () I am a small business owner or shareholder in a small business

I am confident that I am saving efficiently for my

YES () NO () Retirement

YES () NO () Children's education

YES () NO () Grandchildren's future

YES () NO () I have family members or friends who would probably benefit from future financial seminars or helpful information
