



## Important Personal Information Record

KEY: YES  NO

**1. If you, the main income earner for the family, became sick or injured today, do you have a backup plan to pay off the mortgage and meet household costs and children's education costs?**

<b>Backup Plan/s</b>	<b>You</b>	<b>Spouse/Partner</b>
Plan A    Income Protection Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Company	_____	_____
Amount per month cover	\$ _____	\$ _____
Wait Period	_____ Months/years	_____ Months/years
Plan B    Salary Continuance cover in Super	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation Fund	_____	_____
Amount per month cover	\$ _____	\$ _____
Wait Period	_____ Months/years	_____ Months/years

**2. If you or your spouse/partner died or became permanently disabled today would your family be able to pay off the home mortgage and have a suitable lump sum for the future from your insurance cover?**

	<b>You</b>	<b>Spouse/Partner</b>
Life & TPD	<input type="checkbox"/>	<input type="checkbox"/>
Company	_____	_____
Cover	_____	_____

**3. Would your Will be effective in getting the right money from your estate to the right people at the right time?**

**You**

**Spouse/Partner**

Date of last Will \_\_\_\_\_

Solicitor \_\_\_\_\_

Will kept at \_\_\_\_\_

**4. Do you and your spouse/partner have a satisfactory written retirement plan in place?**

Details (e.g. date prepared, place kept & last reviewed)

**5. Do you and your spouse/partner have more than 1 superannuation account?**

**You**

	<b>Fund 1</b>	<b>Fund 2</b>	<b>Fund 3</b>
Current Balance	\$ _____	\$ _____	\$ _____
Fund Name	_____	_____	_____
Amount of contributions last year	\$ _____	\$ _____	\$ _____

**Spouse/Partner**

	<b>Fund 1</b>	<b>Fund 2</b>	<b>Fund 3</b>
Current Balance	\$ _____	\$ _____	\$ _____
Fund Name	_____	_____	_____
Amount of contributions last year	\$ _____	\$ _____	\$ _____

*If you have answered NO to any of these questions, or you have any doubts that you may not be sufficiently covered in any area, we can arrange for you to meet with one of our advisers at a time that suits you.*

**Would you like to be contacted by our staff to arrange a meeting?**

Signature/s \_\_\_\_\_ / /