

WHO IS LOOKING AFTER YOU?

We are here to help!

To help You achieve Your personal Goals & Objectives
FREE Consultation - **NO** Obligation

Please take a moment to look through the sample ideas below and indicate what you would like to achieve through us helping YOU!

I am interested in.....

Cash Improvement Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Financial security! Have money in the bank, a new car, holidays, peace of mind, lifestyle...</p>

Financial Success Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Review and overhaul my financial situation (financial health check)</p>

Tax Minimisation Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Minimise the amount of tax I am going to pay (any other tax minimisation strategies I can take advantage of...?)</p>

Asset Protection Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Ensure that my family and I have an income if I am sick and unable to work for a prolonged period of time</p>

Debt Reduction Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Pay off my debts quicker & / or ensure my loans are structured correctly</p>

Estate Planning
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Ensure the right people will inherit my assets when I die & someone can make decisions on my behalf (if needed)</p>

Income Longevity Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Know how to best invest my money and if my existing investment / strategy is sound</p>

Retirement Maximiser Plan
Yes <input type="checkbox"/> No <input type="checkbox"/> <p>Use the various superannuation & tax rules to <u>my best advantage!</u></p>

Name: _____

Date: _____

Email: _____

Ph: _____