Personal Needs Checklist

Client Name ____________________ Date: __________

Wealth Creation

What Investments are held by you?	
What is your current Net Wealth?	
When do you wish to retire?	
What are your education funding goals?	
What are your holiday funding goals?	
What action is required to achieve your goals?	

Services

Regular investment plan – geared or ungeared?	☐	Business Valuation	☐
Rollover / consolidate Superannuation	☐	Real Estate ROI assessment	☐
Establish Self Managed Fund / wealth-e-account	☐	Use COUNT Financial Needs Analyser	☐

Estate Planning

What would happen to your family and your business if you died? Incapacitated? Became ill?	
Do you have a current Will / Estate Plan?	

Services

Develop new Will / Estate Plan / Power of Attorney	☐	Life / TPD / Trauma Insurance	☐
Business Structure Review	☐	Business Valuation Report	☐
Partnership or Director / Shareholder Agreements	☐	Loss of Profit and / or Assets Insurance	☐
Income Protection Insurance	☐	Key Person Insurance	☐
Professional indemnity insurance and public liability insurance	☐		

Debt Reduction

What plans do you have to reduce your debt?	
How are your loans currently structured?	

Services

Home Loan refinance (and debt recycling strategy)	☐	Consolidate Debt at a lower Interest Rate	☐