3.2 Investment Income/Dividends

Figures are to be entered as annual amounts	Client 1 (or joint)	Client 2
Cash (bank accounts)	$	$
Term deposit	$	$
Managed funds	$	$
Direct shares	$	$
Holiday home	$	$
Investment property 1	$	$
Investment property 2	$	$
Other distributions/Income e.g. business interests, trusts	$	$
Sub-total	**$**	**$**

Additional details:

3.3 Pension Income

Figures are to be entered as annual amounts	Client 1 (or joint)	Client 2
Pension income (including SMSF if relevant)	$	$
Foreign pensions e.g. UK or NZ pensions	$	$
Other:	$	$
Sub-total	**$**	**$**

Additional details:

3.4 Total Income

Figures are to be entered as annual amounts	Client 1 (or joint)	Client 2
3.1 | Income	$	$
3.2 | Investment income/Dividends	$	$
3.3 | Pension Income	$	$
Total (transfer to 5.1)	**$**	**$**

Additional details:

Notes