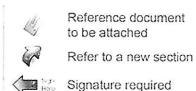


Client Data Form - Financial Planning

What this Document is About

This document, called a Client Data Form (CDEF), collects your financial and personal information to help us provide you with advice.

- □ Part A | Personal Information
- ☐ Part B | Personal Insurances
- ☐ Part C | Personal Expenses
- ☐ Part D | Client Declaration
- ☐ Risk Profile Questionnaire



Prepared for (client details)

Client name(s)	
Date	

Prepared by (Adviser details)

Adviser name	
Company name	
	The above mentioned adviser is an authorised representative of The Complete Planner Pty Ltd
Street address	Phone number
	Fax number
	Email address
Postal address	Website

Licensee details