	Client Data Form – Financial	Planning Part A F	Personal Information	
1.0	Pre-Discovery			
1.1	What is your reason for seeking advice	e?		The state of the s
For exa	ample, the scope of advice is superannuation planning			
4.0				
1.2	Needs and Objectives			
	ample, needs and objectives may include a comfortable and Objectives	retirement with the ability t		
vecus	and Objectives		Priority	
-				
				The state of the s
4.0				WIN COLOR
1.3	Review Frequency			
	ten would you like to review your position?	☐ Quarterly	☐ Half-yearly	Annual Annual
Addition	nal details.	***************************************		
Votes				and the second second section of the second second second section of the second second section
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