Client Data Form – Financial Planning | Part A | Personal Information

Investment Income/Dividends 3.2

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

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:	*		

Total Income 3.4

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)	\$	\$

Notes	
Manager and the second	
Providence and the second	