ABOUT YOU

CLIENT DATA FORM
PRIVATE & CONFIDENTIAL

Client(s):	sourced from mycrm
Adviser:	ANDREW BELL
Authorised Rep No:	1004894
Meeting Date:	user manually enters data / no need to link to mycrm
Date Completed:	user manually enters data / no need to link to mycrm
FSG Version:	010120
Date FSG provided:	Refer Meeting Date
Client ID obtained, verified & certified:	Yes

FOR YOUR INFORMATION

Privacy Policy: At Lifespan Financial Planning we recognise that your privacy is very important. Our business is governed by legislation protecting your personal information, including the Privacy Act 1988 and National Privacy Principles established under the Privacy Amendment (Private Sector) Act 2000. We have adopted the Privacy Policy developed by Lifespan Financial Planning a copy of which is on our website or available upon request.

Important Notice to Clients: Corporations Law requires that in order to make an investment or insurance recommendation, the adviser must have reasonable grounds for making a recommendation. This means that the adviser must conduct an appropriate investigation as to the investment objectives, financial situation and particular needs of the person concerned. The information requested in this form is necessary to enable a recommendation to be made on a reasonable basis and will be used for that purpose

YOUR REASONS FOR SEEKING FINANCIAL ADVICE

Briefly outline your reasons for seeking financial advice.	user manually enters data / no need to link to mycrm
What outcomes are you hoping from our service?	user manually enters data / no need to link to mycrm
Are there any specific concerns or requirements that have prompted you to seek advice?	user manually enters data / no need to link to mycrm
Are there any issues that we should take into account that may affect you achieving your goals?	user manually enters data / no need to link to mycrm
Have you seen a financial adviser previously? If so, what was your experience?	user manually enters data / no need to link to mycrm
What does your future retirement look like to you?	user manually enters data / no need to link to mycrm
Additional Comments	user manually enters data / no need to link to mycrm

YOUR GOALS & OBJECTIVES

Your objectives should be:
S – Specific **M** – Measurable **A** – Attainable **R** – Realistic **T** – Time bound

Include as much information as you can to assist in developing a solution tailored to your specific objectives. Consider the priority and an estimated amount required to obtain the objective.

user manually enters data into this page / no need to link to mycrm

Priority	**Objective**	**Details**	**Time Frame**	**Amount Required**
user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm
user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm
user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm	user manually enters data / no need to link to mycrm
How much money would you like to set aside to be readily available for emergencies & unplanned expenses?		user manually enters data		
Comments		user manually enters data / no need to link to mycrm		

ADVISER NOTES

user manually enters data / no need to link to mycrm

user manually enters data into this page / no need to link to mycrm

ABOUT YOU

	Client 1	Client 2
Title	${about_you_c1_title}sourced from mycrm / about you tab	${about_you_c2_title}sourced from mycrm / about you tab
First name	${about_you_c1_first_name}sourced from mycrm / about you tab	${about_you_c2_first_name}sourced from mycrm / about you tab
Middle name	${about_you_c1_middle_name}sourced from mycrm / about you tab	${about_you_c2_middle_name}sourced from mycrm / about you tab
Surname	${about_you_c1_surname}sourced from mycrm / about you tab	${about_you_c2_surname}sourced from mycrm / about you tab
Preferred name	${about_you_c1_preferred_name}sourced from mycrm / about you tab	${about_you_c2_preferred_name}sourced from mycrm / about you tab
Date of birth	${about_you_c1_date_of_birth}sourced from mycrm / about you tab	${about_you_c2_date_of_birth}sourced from mycrm / about you tab
Country of birth	${about_you_c1_country_of_birth}sourced from mycrm / about you tab	${about_you_c2_country_of_birth}sourced from mycrm / about you tab
Marital status	${about_you_c1_martial_status}sourced from mycrm / about you tab	${about_you_c2_martial_status}sourced from mycrm / about you tab
Resident status	${about_you_c1_resident_status}sourced from mycrm / about you tab	${about_you_c2_resident_status}sourced from mycrm / about you tab
Gender	${about_you_c1_gender}sourced from mycrm / about you tab	${about_you_c2_gender}sourced from mycrm / about you tab
Current health	${about_you_c1_current_health}sourced from mycrm / about you tab	${about_you_c2_current_health}sourced from mycrm / about you tab
Medical history / issues	${about_you_c1_medical_history_issues}sourced from mycrm / about you tab	${about_you_c2_medical_history_issues}sourced from mycrm / about you tab
Health comments	${about_you_c1_health_comments}sourced from mycrm / about you tab	${about_you_c2_health_comments}sourced from mycrm / about you tab
Have you smoked in the last 12 months?	${about_you_c1_smoked_in_last_12_months}sourced from mycrm / about you tab	${about_you_c2_smoked_in_last_12_months}sourced from mycrm / about you tab
Do you use nicotine containing products?	${about_you_c1_use_nicotine_containing_products}sourced from mycrm / about you tab	${about_you_c2_use_nicotine_containing_products}sourced from mycrm / about you tab
Private health cover	${about_you_c1_private_health_insurer_name}sourced from mycrm / about you tab	${about_you_c2_private_health_insurer_name}sourced from mycrm / about you tab
How did you hear about us	${about_you_c1_how_did_you_hear_about_us} ${about_you_c2_how_did_you_hear_about_us}sourced from mycrm / about you tab	
If referred, please let us know who referred you	${about_you_c1_if_referred_how_referred_you} ${about_you_c2_if_referred_how_referred_you}sourced from mycrm / about you tab	
Comments | Notes	${about_you_about_you_notes}sourced from mycrm / about you tab	

CONTACT INFORMATION

	Client 1		Client 2	
Residential Address	${contact_c1_residential_address} ${contact_c2_residential_address}sourced from mycrm / contact tab			
Postal address if different from residential	${contact_c1_postal_address} ${contact_c2_postal_address}sourced from mycrm / contact tab			
Preferred method	${contact_c1_document_delivery_method} ${contact_c2_document_delivery_method}user manually enters data / no need to link to mycrm			
Document Delivery Format	${contact_c1_document_delivery_method} ${contact_c2_document_delivery_method}sourced from mycrm / contact tab			
Home phone	${contact_c1_phone_home}sourced from mycrm / contact tab		${contact_c2_phone_home}sourced from mycrm / contact tab	
Work phone	${contact_c1_phone_work}sourced from mycrm / contact tab		${contact_c2_phone_work}sourced from mycrm / contact tab	
Mobile phone	${contact_c1_phone_mobile}sourced from mycrm / contact tab		${contact_c2_phone_mobile}sourced from mycrm / contact tab	
Home email	${contact_c1_email_1}sourced from mycrm / contact tab		${contact_c2_email_1 }sourced from mycrm / contact tab	
Work email	${contact_c1_email_2}sourced from mycrm / contact tab		${contact_c2_email_2}sourced from mycrm / contact tab	
Comments | Notes	${contact_contact_notes}sourced from mycrm / contact tab			

DEPENDANTS

Name	Relationship	DOB	Financially dependent?
${dependants_first_name_1}sourced from mycrm / dependants tab	${dependants_relationship_1}sourced from mycrm / dependants tab	${dependants_dob_1}sourced from mycrm / dependants tab	${dependants_financial_dependent_y_n_1}sourced from mycrm / dependants tab
${dependants_first_name_2}sourced from mycrm / dependants tab	${dependants_relationship_2}sourced from mycrm / dependants tab	${dependants_dob_2}sourced from mycrm / dependants tab	${dependants_financial_dependent_y_n_2}sourced from mycrm / dependants tab
${dependants_first_name_3}sourced from mycrm / dependants tab	${dependants_relationship_3}sourced from mycrm / dependants tab	${dependants_dob_3}sourced from mycrm / dependants tab	${dependants_financial_dependent_y_n_3}sourced from mycrm / dependants tab
${dependants_first_name_4}sourced from mycrm / dependants tab	${dependants_relationship_4}sourced from mycrm / dependants tab	${dependants_dob_4}sourced from mycrm / dependants tab	${dependants_financial_dependent_y_n_4}sourced from mycrm / dependants tab

Do you have grandchildren?	${dependants_prefer_not_discuss_grandchildren_details}sourced from mycrm / dependants tab
Do you expect to continue to provide financially assist to your non-dependent children?	${dependants_you_expect_continue_provide_financially_assist}sourced from mycrm / dependants tab
Are you planning to grow your family?	${dependants_are_you_planning_grow_your_family}sourced from mycrm / dependants tab
Do any of your dependants suffer from illness or disability?	${dependants_any_your_dependants_suffer_illness}sourced from mycrm / dependants tab
Do any of your dependants receive youth allowance?	${dependants_any_your_dependants_receive_youth_allowance}sourced from mycrm / dependants tab
Are of your dependants engaged in full time study?	${dependants_any_your_dependants_studying_full_time}sourced from mycrm / dependants tab
Comments | Notes	${dependants_dependants_notes}sourced from mycrm / dependants tab

YOUR EMPLOYMENT

	Client 1	**Client 2**
Occupation	${employment_c1_occupation}sourced from mycrm / employment tab	${employment_c2_occupation}sourced from mycrm / employment tab
Employee / Self Employed	${employment_c1_type}sourced from mycrm / employment tab	${employment_c2_type}sourced from mycrm / employment tab
Type	${employment_c1_working_type}sourced from mycrm / employment tab	${employment_c2_working_type}sourced from mycrm / employment tab
Employer	${employment_c1_employer}sourced from mycrm / employment tab	${employment_c2_employer}sourced from mycrm / employment tab
Date Started	${employment_c1_date_started}sourced from mycrm / employment tab	${employment_c2_date_started}sourced from mycrm / employment tab
Hours per Week	${employment_c1_hours_per_week}sourced from mycrm / employment tab	${employment_c2_hours_per_week}sourced from mycrm / employment tab
Annual Leave Accrued Long Service Leave Accrued Sick Leave Accrued	${employment_c1_annual_leave} ${employment_c1_long_service_leave} ${employment_c1_sick_leave}sourced from mycrm / employment tab	${employment_c2_annual_leave} ${employment_c2_long_service_leave} ${employment_c2_sick_leave}sourced from mycrm / employment tab
Qualifications	${employment_c1_qualifications}sourced from mycrm / employment tab	${employment_c2_qualifications}sourced from mycrm / employment tab
Have you been recently retrenched?	${employment_c1_recently_retrenched}sourced from mycrm / employment tab	${employment_c2_recently_retrenched}sourced from mycrm / employment tab
Comments (e.g. do you expect to continue with your current occupation / any changes planned in next 12 months / etc)?	${employment_c1_any_changes_planned}sourced from mycrm / employment tab	${employment_c2_any_changes_planned}sourced from mycrm / employment tab
Have you worked outside of Australia?	${employment_c1_worked_outside_of_australia}sourced from mycrm / employment tab	${employment_c2_worked_outside_of_australia}sourced from mycrm / employment tab
Do you have a second occupation? If so, please provide details.	${employment_c1_second_occupation}sourced from mycrm / employment tab	${employment_c2_second_occupation}sourced from mycrm / employment tab

SOCIAL SECURITY / CENTRELINK

Not in Scope / Not Disclosed / None / Section Not Applicable because:

	Client 1	**Client 2**
Are you currently receiving Centrelink benefits?	${centrelink_social_security_centrelink_income_support_client_1}sourced from mycrm / centrelink tab	${centrelink_social_security_centrelink_income_support_client_2}sourced from mycrm / centrelink tab
Customer Reference Number (CRN)	${centrelink_crn_client_1}sourced from mycrm / centrelink tab	${centrelink_crn_client_2}sourced from mycrm / centrelink tab
Type of Income Support Payment	${centrelink_type_of_income_support_client_1}sourced from mycrm / centrelink tab	${centrelink_type_of_income_support_client_2}sourced from mycrm / centrelink tab
Payment amount (fortnightly)	${centrelink_payment_per_fortnight_client_1}sourced from mycrm / centrelink tab	${centrelink_payment_per_fortnight_client_2}sourced from mycrm / centrelink tab
Are you claiming the Family Tax Benefit?	${centrelink_family_tax_benefits_received_client_1}sourced from mycrm / centrelink tab	${centrelink_family_tax_benefits_received_client_2}sourced from mycrm / centrelink tab
Amount Received (per annum)	${centrelink_}sourced from mycrm / centrelink tab	${centrelink_}sourced from mycrm / centrelink tab
Are you a DVA Health Card holder?	${centrelink_dav_health_card_holder_client_1}sourced from mycrm / centrelink tab	${centrelink_dav_health_card_holder_client_2}sourced from mycrm / centrelink tab
Do you hold any other concession or health card cards	${centrelink_concession_card_holder_client_1}sourced from mycrm / centrelink tab	${centrelink_concession_card_holder_client_2}sourced from mycrm / centrelink tab
Details of other entitlements received or cards held	${centrelink_any_other_entitlements_or_benefits_client_1}sourced from mycrm / centrelink tab	${centrelink_any_other_entitlements_or_benefits_client_2}sourced from mycrm / centrelink tab
Have you gifted any assets in the last five years?	${centrelink_have_you_gifted_any_assets_client_1}sourced from mycrm / centrelink tab	${centrelink_have_you_gifted_any_assets_client_2}sourced from mycrm / centrelink tab
Comments | Notes	${centrelink_centre_link_notes}sourced from mycrm / centrelink tab	

TAX

Not in Scope / Not Disclosed / None / Section Not Applicable because:

	Client 1	Client 2
Tax file number*	${tax_tfn_client_1}sourced from mycrm / tax tab	${tax_tfn_client_2}sourced from mycrm / tax tab
Are you an Australian resident for tax purposes?	${tax_aus_tax_resident_for_tax_client_1}sourced from mycrm / tax tab	${tax_aus_tax_resident_for_tax_client_2}sourced from mycrm / tax tab
Do you have HECS/HELP debt?	${tax_hecs_help_debt_client_1}sourced from mycrm / tax tab	${tax_hecs_help_debt_client_2}sourced from mycrm / tax tab
Do you have any overseas tax issues?	${tax_overseas_tax_issues_client_1}sourced from mycrm / tax tab	${tax_overseas_tax_issues_client_2}sourced from mycrm / tax tab
Are you receiving any overseas income?	${tax_overseas_income_received_client_1}sourced from mycrm / tax tab	${tax_overseas_income_received_client_2}sourced from mycrm / tax tab
Comments | Notes	${tax_tax_notes}sourced from mycrm / tax tab	

ESTATE PLANNING

None / Not in Scope / Not Disclosed / Section Not Applicable because:

WILL	Client 1	Client 2
Do you have a Will	${estate_will_do_you_have_will_client_1}sourced from mycrm / estate (wills) tab	${estate_will_do_you_have_will_client_2}sourced from mycrm / estate (wills) tab
Date of Will & Date Last Reviewed	${estate_will_will_date_client_1}sourced from mycrm / estate (wills) tab	${estate_will_will_date_client_2}sourced from mycrm / estate (wills) tab
Location of Will	${estate_will_location_of_will_client_1}sourced from mycrm / estate (wills) tab	${estate_will_location_of_will_client_2}sourced from mycrm / estate (wills) tab
Solicitor Name	${estate_will_solicitor_name_client_1}sourced from mycrm / estate (wills) tab	${estate_will_solicitor_name_client_2}sourced from mycrm / estate (wills) tab
Executors Name	${estate_will_executor_name_1_client_1}sourced from mycrm / estate (wills) tab	${estate_will_executor_name_1_client_2}sourced from mycrm / estate (wills) tab
Do you need to review Executors (if blank it means no review needed)?	${estate_will_need_review_your_executor_client_1}sourced from mycrm / estate (wills) tab	${estate_will_need_review_your_executor_client_2}sourced from mycrm / estate (wills) tab
Does your Will reflect your current wishes and beneficiaries?	${estate_will_will_reflect_your_current_wishes_andbeneficiaries_client_1}sourced from mycrm / estate (wills) tab	${estate_will_will_reflect_your_current_wishes_andbeneficiaries_client_2}sourced from mycrm / estate (wills) tab
Will your estate have sufficient liquidity to cover debts and expenses?	${estate_will_estate_have_sufficient_liquidity_client_1}sourced from mycrm / estate (wills) tab	${estate_will_estate_have_sufficient_liquidity_client_2}sourced from mycrm / estate (wills) tab
Is there sufficient cash to cover the cost of your funeral?	${estate_will_sufficient_cash_cover_cost_of_funeral_client_1}sourced from mycrm / estate (wills) tab	${estate_will_sufficient_cash_cover_cost_of_funeral_client_2}sourced from mycrm / estate (wills) tab
Have your invested in Funeral Bonds or any other pre-paid arrangements?	${estate_will_have_your_invested_in_funeral_bonds_client_1}sourced from mycrm / estate (wills) tab	${estate_will_have_your_invested_in_funeral_bonds_client_2}sourced from mycrm / estate (wills) tab
Have you considered all of your assets/liabilities in your estate planning arrangements (e.g. shares in businesses, super, debts)?	${estate_will_considered_assets_liabilities_estate_planning_client_1}sourced from mycrm / estate (wills) tab	${estate_will_considered_assets_liabilities_estate_planning_client_2}sourced from mycrm / estate (wills) tab
Do you have provisions for a testamentary trust?	${estate_will_have_provisions_for_testamentary_trust_client_1}sourced from mycrm / estate (wills) tab	${estate_will_have_provisions_for_testamentary_trust_client_2}sourced from mycrm / estate (wills) tab
Would you like to gift a part of your estate to charity?	${estate_will_like_to_gift_your_estate_to_charity_client_1}sourced from mycrm / estate (wills) tab	${estate_will_like_to_gift_your_estate_to_charity_client_2}sourced from mycrm / estate (wills) tab

Client 1 Beneficiaries		Client 2 Beneficiaries	
Name	**Relationship**	**Name**	**Relationship**
${estate_will_beneficiary_details_name_1}sourced from mycrm / estate (wills) tab	${estate_will_beneficiary_details_relationship_1}sourced from mycrm / estate (wills) tab	${estate_will_beneficiary_details_name_2}sourced from mycrm / estate (wills) tab	${estate_will_beneficiary_details_relationship_2}sourced from mycrm / estate (wills) tab

ESTATE PLANNING CONT'D

None / Not in Scope / Not Disclosed / Section Not Applicable because:

POWER of ATTORNEY	**Client 1**	**Client 2**
Do you have a Power of Attorney?	${estate_poa_do_you_have_power_of_attorney_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_do_you_have_power_of_attorney_client_2}sourced from mycrm / estate (poa) tab
Date of Power of Attorney / Date Lasted Reviewed	${estate_poa_poa_date_client_1} ${estate_poa_last_review_date_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_poa_date_client_2}s${estate_poa_last_review_date_client_2}ourced from mycrm / estate (poa) tab
Location of Power of Attorney	${estate_poa_location_of_poa_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_location_of_poa_client_2}sourced from mycrm / estate (poa) tab
Name of Solicitor	${estate_poa_solicitor_name_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_solicitor_name_client_2}sourced from mycrm / estate (poa) tab
Type of Power of Attorney (tick all applicable)	${estate_poa_poa_type_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_poa_type_client_2}sourced from mycrm / estate (poa) tab
Who is your Power Attorney?	${estate_poa_power_of_attorney_name_1_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_power_of_attorney_name_1_client_2}sourced from mycrm / estate (poa) tab
Who is your alternative Power Attorney?	${estate_poa_alternative_power_of_attorney_name_1_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_alternative_power_of_attorney_name_1_client_2}sourced from mycrm / estate (poa) tab
Are your nominated Power of Attorney(s) reflective of your wishes?	${estate_poa_are_your_nominated_poa_reflective_your_wishes_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_are_your_nominated_poa_reflective_your_wishes_client_2}sourced from mycrm / estate (poa) tab
Do you have provisions for testamentary trust?	${estate_poa_do_you_have_provisions_for_testamentary_trust_client_1}sourced from mycrm / estate (poa) tab	${estate_poa_do_you_have_provisions_for_testamentary_trust_client_2}sourced from mycrm / estate (poa) tab
Comments | Notes	${estate_poa_estate_poa_notes}sourced from mycrm / estate (poa) tab	${estate_poa_estate_poa_notes}sourced from mycrm / estate (poa) tab

OTHER PROFESSIONAL ADVISERS

None / Not in Scope / Not Disclosed

	Client 1	Client 2
Solicitor's details		
Name	${other_advisers_solicitor_client_1} / ${other_advisers_solicitor_client_2}sourced from mycrm / other adviser tab	
Company	${other_advisers_solicitor_company_client_1} / ${other_advisers_solicitor_company_client_2}sourced from mycrm / other adviser tab	
Phone number	${other_advisers_solicitor_phone_client_1} / ${other_advisers_solicitor_phone_client_2}sourced from mycrm / other adviser tab	
Email	${other_advisers_solicitor_email_client_1} / ${other_advisers_solicitor_email_client_2}sourced from mycrm / other adviser tab	
Address	${other_advisers_solicitor_address_client_1} / ${other_advisers_solicitor_address_client_2}sourced from mycrm / other adviser tab	
Authority to contact	${other_advisers_solicitor_authority_to_contact_client_1} / ${other_advisers_solicitor_authority_to_contact_client_2}sourced from mycrm / other adviser tab	
Relationship	${other_advisers_solicitor_relationship_client_1} / ${other_advisers_solicitor_relationship_client_2}sourced from mycrm / other adviser tab	
Comments | Notes	${other_advisers_other_advisers_notes}sourced from mycrm / other adviser tab	
Accountant's details		
Name	${other_advisers_accountant_client_1} / ${other_advisers_accountant_client_2}sourced from mycrm / other adviser tab	
Company	${other_advisers_accountant_company_client_1} / ${other_advisers_accountant_company_client_2}sourced from mycrm / other adviser tab	
Phone number	${other_advisers_accountant_phone_client_1} / ${other_advisers_accountant_phone_client_2}sourced from mycrm / other adviser tab	
Email	${other_advisers_accountant_email_client_1} / ${other_advisers_accountant_email_client_2}sourced from mycrm / other adviser tab	
Address	${other_advisers_accountant_address_client_1} / ${other_advisers_accountant_address_client_2}sourced from mycrm / other adviser tab	
Authority to contact	${other_advisers_accountant_authority_to_contact_client_1} / ${other_advisers_accountant_authority_to_contact_client_2}sourced from mycrm / other adviser tab	
Relationship	${other_advisers_accountant_relationship_client_1} / ${other_advisers_accountant_relationship_client_2}sourced from mycrm / other adviser tab	
Comments | Notes	${other_advisers_other_advisers_notes}sourced from mycrm / other adviser tab	
Other professional advisers (e.g. insurance advisers, brokers, other financial advisers)		
Type	${other_advisers_opa_type_client_1}sourced from mycrm / other adviser tab	
Name and contact details	${other_advisers_opa_name_client_1} ${other_advisers_opa_phone_client_1} ${other_advisers_opa_email_client_1} ${other_advisers_opa_address_client_1}sourced from mycrm / other adviser tab	
Type	${other_advisers_opa_type_client_2}sourced from mycrm / other adviser tab	
Name and contact details	${other_advisers_opa_name_client_2} ${other_advisers_opa_phone_client_2} ${other_advisers_opa_email_client_2} ${other_advisers_opa_address_client_2}sourced from mycrm / other adviser tab	

STRUCTURES & ENTITIES

None / Not in Scope / Not Disclosed

Self-Managed Superannuation Fund	
Name	${structures_entities_smsf_name}sourced from mycrm / structures & entities tab
Trustees	${structures_entities_smsf_trustees}sourced from mycrm / structures & entities tab
TFN	${structures_entities_smsf_tfn}sourced from mycrm / structures & entities tab
Members	${structures_entities_smsf_members}sourced from mycrm / structures & entities tab
Date of establishment	${structures_entities_smsf_date_commenced}sourced from mycrm / structures & entities tab
Comments | Notes	${structures_entities_smsf_notes}sourced from mycrm / structures & entities tab

Company	
Name	${structures_entities_company_name}sourced from mycrm / structures & entities tab
Purpose	${structures_entities_company_purpose}sourced from mycrm / structures & entities tab
ABN	${structures_entities_company_abn}sourced from mycrm / structures & entities tab
Date of incorporation	${structures_entities_company_date_if_incorporation}sourced from mycrm / structures & entities tab
Director/s	${structures_entities_company_directors}sourced from mycrm / structures & entities tab
Shareholder/s	${structures_entities_company_shareholders}sourced from mycrm / structures & entities tab
Comments | Notes	${structures_entities_company_notes}sourced from mycrm / structures & entities tab

Trust	
Name	${structures_entities_trust_name}sourced from mycrm / structures & entities tab
Purpose	${structures_entities_trust_purpose}sourced from mycrm / structures & entities tab
Trustee Type	${structures_entities_trust_trustee_type}sourced from mycrm / structures & entities tab
Trustee/s	${structures_entities_trust_trustees}sourced from mycrm / structures & entities tab
Beneficiaries	${structures_entities_trust_beneficiaries}sourced from mycrm / structures & entities tab
Comments | Notes	${structures_entities_trust_notes}sourced from mycrm / structures & entities tab

Partnership	
Name	${structures_entities_partnership_name}sourced from mycrm / structures & entities tab
Purpose	${structures_entities_partnership_purpose}sourced from mycrm / structures & entities tab
Partners	${structures_entities_partnership_partners}sourced from mycrm / structures & entities tab
Comments | Notes	${structures_entities_partnership_notes}sourced from mycrm / structures & entities tab

CASHFLOW

Not in Scope / Not Disclosed / None / Section Not Applicable because:

Income Summary (Annual)			
Source of Income	**Client 1 ($ before tax)**	**Client 2 ($ before tax)**	**Joint ($ before tax)**
${cashflow_income_source_1}sourced from mycrm / cashflow tab	${cashflow_income_source_1_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_1_client_2}sourced from mycrm / cashflow tab	
${cashflow_income_source_2}sourced from mycrm / cashflow tab	${cashflow_income_source_2_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_2_client_2}sourced from mycrm / cashflow tab	
${cashflow_income_source_3}sourced from mycrm / cashflow tab	${cashflow_income_source_3_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_3_client_2}sourced from mycrm / cashflow tab	
${cashflow_income_source_4}sourced from mycrm / cashflow tab	${cashflow_income_source_4_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_4_client_2}sourced from mycrm / cashflow tab	
${cashflow_income_source_5}sourced from mycrm / cashflow tab	${cashflow_income_source_5_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_5_client_2}sourced from mycrm / cashflow tab	
${cashflow_income_source_6}sourced from mycrm / cashflow tab	${cashflow_income_source_6_client_1}sourced from mycrm / cashflow tab	${cashflow_income_source_6_client_2}sourced from mycrm / cashflow tab	
INCOME (before tax)			

Expenses / Savings (Annual)	**Client 1**	*Tax Deductible*	**Client 2**	*Tax Deductible*	**Joint**	*Tax Deductible*
${cashflow_expenses_savings_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_1_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_1_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_1_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_1_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_expenses_savings_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_2_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_2_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_2_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_2_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_expenses_savings_3}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_3_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_3_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_3_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_3_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_expenses_savings_4}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_4_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_4_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_4_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_4_client_2_taxable}sourced from mycrm / cashflow tab		

${cashflow_expenses_savings_5}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_5_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_5_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_5_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_5_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_expenses_savings_6}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_6_client_1}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_6_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_6_client_2}sourced from mycrm / cashflow tab	${cashflow_expenses_savings_6_client_2_taxable}sourced from mycrm / cashflow tab		
EXPENSES / SAVINGS						

Debt Repayments (Annual)	**Client 1**	*Tax Deductible*	**Client 2**	*Tax Deductible*	**Joint**	*Tax Deductible*
${cashflow_debt_repayments_1}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_1_client_1}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_1_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_1_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_1_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_debt_repayments_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_debt_repayments_3}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_3_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_3_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_3_client_2_taxable}sourced from mycrm / cashflow tab		
${cashflow_debt_repayments_4}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_4_client_1_taxable}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_4_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_4_client_2_taxable}sourced from mycrm / cashflow tab		

${cashflow_debt_repayments_5}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1} sourced from mycrm / cashflow tab	${cashflow_debt_repayments_5_client_1_taxable} sourced from mycrm / cashflow tab	${cashflow_debt_repayments_5_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_5_client_2_taxable} sourced from mycrm / cashflow tab		
${cashflow_debt_repayments_6}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_2_client_1} sourced from mycrm / cashflow tab	${cashflow_debt_repayments_6_client_1_taxable} sourced from mycrm / cashflow tab	${cashflow_debt_repayments_6_client_2}sourced from mycrm / cashflow tab	${cashflow_debt_repayments_6_client_2_taxable} sourced from mycrm / cashflow tab		
EXPENSES / SAVINGS						

Expenditure Details	
What is your annual cost of living?	user manually enters data / no need to link to mycrm
Do you have a cashflow surplus? If so, approximately how much per month?	user manually enters data / no need to link to mycrm
If you have a cashflow surplus, how is this allocated or spent?	user manually enters data / no need to link to mycrm
If you have a cashflow deficit, how is this being funded?	user manually enters data / no need to link to mycrm

PLANNED FUTURE SIGNIFICANT EXPENDITURE

None / Not in Scope / Not Disclosed

Planned future significant expenditure (e.g. new car, renovations, overseas trips, etc.)		
What	**Amount**	**When**
${capital_expenses_planned_future_significant_expenditure_1}sourced from mycrm / capital expenses tab	${capital_expenses_amount_1}sourced from mycrm / capital expenses tab	${capital_expenses_when_1}sourced from mycrm / capital expenses tab
${capital_expenses_planned_future_significant_expenditure_2}sourced from mycrm / capital expenses tab	${capital_expenses_amount_2}sourced from mycrm / capital expenses tab	${capital_expenses_when_2}sourced from mycrm / capital expenses tab
${capital_expenses_planned_future_significant_expenditure_3}sourced from mycrm / capital expenses tab	${capital_expenses_amount_3}sourced from mycrm / capital expenses tab	${capital_expenses_when_3}sourced from mycrm / capital expenses tab
${capital_expenses_planned_future_significant_expenditure_4}sourced from mycrm / capital expenses tab	${capital_expenses_amount_4}sourced from mycrm / capital expenses tab	${capital_expenses_when_4}sourced from mycrm / capital expenses tab
${capital_expenses_planned_future_significant_expenditure_5}sourced from mycrm / capital expenses tab	${capital_expenses_amount_5}sourced from mycrm / capital expenses tab	${capital_expenses_when_5}sourced from mycrm / capital expenses tab
${capital_expenses_planned_future_significant_expenditure_6}sourced from mycrm / capital expenses tab	${capital_expenses_amount_6}sourced from mycrm / capital expenses tab	${capital_expenses_when_6}sourced from mycrm / capital expenses tab

OTHER

None / Not in Scope / Not Disclosed

	Client 1	**Client 2**
Do you anticipate any significant changes to your income or expenses in the next 12 months?	${cashflow_any_significant_changes_to_income_expenses}sourced from mycrm / cashflow tab	${cashflow_any_significant_changes_to_income_expenses}sourced from mycrm / cashflow tab
Are you expecting to receive any lump-sum payments in the next 12 months (e.g. inheritance, sale of assets, etc.)?	${cashflow_expecting_any_lump_sum_payments}sourced from mycrm / cashflow tab	${cashflow_expecting_any_lump_sum_payments}sourced from mycrm / cashflow tab
Comments	${cashflow_cashflow_notes}sourced from mycrm / cashflow tab	

ASSETS & LIABILITIES

Not in Scope / Not Disclosed / None / See attached statements / Section Not Applicable because:

Lifestyle Assets	Owner	Split %	Current Vale	Purchase Price	Purchase Date	Linked to loan
${assets_lifestlye_assets_1} sourced from mycrm / assets tab	${assets_la_value_1_client_1} sourced from mycrm / assets tab		${assets_la_value_1_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_1} sourced from mycrm / assets tab	${assets_la_purchase_date_1} sourced from mycrm / assets tab	${assets_la_linked_to_loan_1} sourced from mycrm / assets tab
${assets_lifestlye_assets_2} sourced from mycrm / assets tab	${assets_la_value_2_client_1} sourced from mycrm / assets tab		${assets_la_value_2_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_2} sourced from mycrm / assets tab	${assets_la_purchase_date_2} sourced from mycrm / assets tab	${assets_la_linked_to_loan_2} sourced from mycrm / assets tab
${assets_lifestlye_assets_3} sourced from mycrm / assets tab	${assets_la_value_3_client_1} sourced from mycrm / assets tab		${assets_la_value_3_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_3} sourced from mycrm / assets tab	${assets_la_purchase_date_3} sourced from mycrm / assets tab	${assets_la_linked_to_loan_3} sourced from mycrm / assets tab
${assets_lifestlye_assets_4} sourced from mycrm / assets tab	${assets_la_value_4_client_1} sourced from mycrm / assets tab		${assets_la_value_4_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_4} sourced from mycrm / assets tab	${assets_la_purchase_date_4} sourced from mycrm / assets tab	${assets_la_linked_to_loan_4} sourced from mycrm / assets tab
${assets_lifestlye_assets_5} sourced from mycrm / assets tab	${assets_la_value_5_client_1} sourced from mycrm / assets tab		${assets_la_value_5_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_5} sourced from mycrm / assets tab	${assets_la_purchase_date_5} sourced from mycrm / assets tab	${assets_la_linked_to_loan_5} sourced from mycrm / assets tab
${assets_lifestlye_assets_6} sourced from mycrm / assets tab	${assets_la_value_6_client_1} sourced from mycrm / assets tab		${assets_la_value_6_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_6} sourced from mycrm / assets tab	${assets_la_purchase_date_6} sourced from mycrm / assets tab	${assets_la_linked_to_loan_6} sourced from mycrm / assets tab
${assets_lifestlye_assets_7} sourced from mycrm / assets tab	${assets_la_value_7_client_1} sourced from mycrm / assets tab		${assets_la_value_7_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_7} sourced from mycrm / assets tab	${assets_la_purchase_date_7} sourced from mycrm / assets tab	${assets_la_linked_to_loan_7} sourced from mycrm / assets tab
${assets_lifestlye_assets_8} sourced from mycrm / assets tab	${assets_la_value_8_client_1} sourced from mycrm / assets tab		${assets_la_value_8_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_8} sourced from mycrm / assets tab	${assets_la_purchase_date_8} sourced from mycrm / assets tab	${assets_la_linked_to_loan_8} sourced from mycrm / assets tab
${assets_lifestlye_assets_9} sourced from mycrm / assets tab	${assets_la_value_9_client_1} sourced from mycrm / assets tab		${assets_la_value_9_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_9} sourced from mycrm / assets tab	${assets_la_purchase_date_9} sourced from mycrm / assets tab	${assets_la_linked_to_loan_9} sourced from mycrm / assets tab
${assets_lifestlye_assets_10} sourced from mycrm / assets tab	${assets_la_value_10_client_1} sourced from mycrm / assets tab		${assets_la_value_10_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_10} sourced from mycrm / assets tab	${assets_la_purchase_date_10} sourced from mycrm / assets tab	${assets_la_linked_to_loan_10} sourced from mycrm / assets tab
${assets_lifestlye_assets_11} sourced from mycrm / assets tab	${assets_la_value_11_client_1} sourced from mycrm / assets tab		${assets_la_value_11_client_2} sourced from mycrm / assets tab	${assets_la_purchase_price_11} sourced from mycrm / assets tab	${assets_la_purchase_date_11} sourced from mycrm / assets tab	${assets_la_linked_to_loan_11} sourced from mycrm / assets tab

Bank Accounts (Non-Super)	**Owner**	**Current Value**
${assets_fa_bank_account_1} sourced from mycrm / assets tab	${assets_fa_value_1_client_1} sourced from mycrm / assets tab	${assets_fa_value_1_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_2} sourced from mycrm / assets tab	${assets_fa_value_2_client_1} sourced from mycrm / assets tab	${assets_fa_value_2_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_3} sourced from mycrm / assets tab	${assets_fa_value_3_client_1} sourced from mycrm / assets tab	${assets_fa_value_3_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_4} sourced from mycrm / assets tab	${assets_fa_value_4_client_1} sourced from mycrm / assets tab	${assets_fa_value_4_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_5} sourced from mycrm / assets tab	${assets_fa_value_5_client_1} sourced from mycrm / assets tab	${assets_fa_value_5_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_6} sourced from mycrm / assets tab	${assets_fa_value_6_client_1} sourced from mycrm / assets tab	${assets_fa_value_6_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_7} sourced from mycrm / assets tab	${assets_fa_value_7_client_1} sourced from mycrm / assets tab	${assets_fa_value_7_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_8} sourced from mycrm / assets tab	${assets_fa_value_8_client_1} sourced from mycrm / assets tab	${assets_fa_value_8_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_9} sourced from mycrm / assets tab	${assets_fa_value_9_client_1} sourced from mycrm / assets tab	${assets_fa_value_9_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_10} sourced from mycrm / assets tab	${assets_fa_value_10_client_1} sourced from mycrm / assets tab	${assets_fa_value_10_client_2} sourced from mycrm / assets tab
${assets_fa_bank_account_11} sourced from mycrm / assets tab	${assets_fa_value_11_client_1} sourced from mycrm / assets	${assets_fa_value_11_client_2} sourced from mycrm / assets tab

	tab	
${assets_fa_bank_account_12} sourced from mycrm / assets tab	${assets_fa_value_12_client_1} sourced from mycrm / assets tab	${assets_fa_value_12_client_2} sourced from mycrm / assets tab

Investment Assets (Non-Super)	**Owner**	**Purchase Price**	**Purchase Date**	**Current Value**
${assets_investment_non_super_1} sourced from mycrm / assets tab	${assets_ins_value_1_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_1} sourced from mycrm / assets tab	${assets_ins_purchase_date_1} sourced from mycrm / assets tab	${assets_ins_value_1_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_2} sourced from mycrm / assets tab	${assets_ins_value_2_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_2} sourced from mycrm / assets tab	${assets_ins_purchase_date_2} sourced from mycrm / assets tab	${assets_ins_value_2_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_3} sourced from mycrm / assets tab	${assets_ins_value_3_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_3} sourced from mycrm / assets tab	${assets_ins_purchase_date_3} sourced from mycrm / assets tab	${assets_ins_value_3_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_4} sourced from mycrm / assets tab	${assets_ins_value_4_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_4} sourced from mycrm / assets tab	${assets_ins_purchase_date_4} sourced from mycrm / assets tab	${assets_ins_value_4_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_5} sourced from mycrm / assets tab	${assets_ins_value_5_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_5} sourced from mycrm / assets tab	${assets_ins_purchase_date_5} sourced from mycrm / assets tab	${assets_ins_value_5_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_6} sourced from mycrm / assets tab	${assets_ins_value_6_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_6} sourced from mycrm / assets tab	${assets_ins_purchase_date_6} sourced from mycrm / assets tab	${assets_ins_value_6_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_7} sourced from mycrm / assets tab	${assets_ins_value_7_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_7} sourced from mycrm / assets tab	${assets_ins_purchase_date_7} sourced from mycrm / assets tab	${assets_ins_value_7_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_8} sourced from mycrm / assets tab	${assets_ins_value_8_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_8} sourced from mycrm / assets tab	${assets_ins_purchase_date_8} sourced from mycrm / assets tab	${assets_ins_value_8_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_9} sourced from mycrm / assets tab	${assets_ins_value_9_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_9} sourced from mycrm / assets tab	${assets_ins_purchase_date_9} sourced from mycrm / assets tab	${assets_ins_value_9_client_2} sourced from mycrm / assets tab
${assets_investment_non_super_10} sourced from mycrm / assets tab	${assets_ins_value_10_client_1} sourced from mycrm / assets tab	${assets_ins_purchase_price_10} sourced from mycrm / assets tab	${assets_} sourced from mycrm / assets tab	${assets_ins_value_10_client_2} sourced from mycrm / assets tab

Superannuation Assets (Accumulation)	**Owner**	**Purchase Price**	**Purchase Date**	**Current Value**
${assets_superannuation_accumulation_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_1_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_1_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_2_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_2_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_3_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_3_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_4_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_4_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_5_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_5_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_6_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_6_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_7} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_7_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_7} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_7} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_7_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_8} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_8_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_8} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_8} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_8_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_9} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_9_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_9}sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_9} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_9_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_10} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_10_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_price_10}sourced from mycrm / assets tab	${assets_superannuation_accumulation_purchase_date_10} sourced from mycrm / assets tab	${assets_superannuation_accumulation_value_10_client_2} sourced from mycrm / assets tab

Superannuation Assets (Pension)	Owner	Purchase Price	Purchase Date	Current Value
${assets_superannuation_accumulation_pd_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_1_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_1_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_pd_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_2_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_2} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_2_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_pd_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_3_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_3} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_3_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_pd_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_4_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_4} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_4_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_pd_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_5_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_5} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_5_client_2} sourced from mycrm / assets tab
${assets_superannuation_accumulation_pd_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_6_client_1} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_price_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_purchase_date_6} sourced from mycrm / assets tab	${assets_superannuation_accumulation_pd_value_6_client_2} sourced from mycrm / assets tab

Comments:
${assets_assets_notes} sourced from mycrm / assets tab

LIABILITIES

None / Not in Scope / Not Disclosed / See attached statements / Section Not Applicable because:

Liability | Description	Outstanding Balance Client 1	Outstanding Balance Client 1	Start Date	Interest Rate (p.a.)	Fixed / Variable	Repayments / Frequency	Repayment Type (I/O P&I)	Tax Deductible Interest
${liabilities_liability_description_1}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_client_1}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_client_2}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_start_date}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_interest}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_fix_var}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_repayments}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_io_pi}sourced from mycrm / liabilities tab	${liabilities_liability_description_1_tax_deduction}sourced from mycrm / liabilities tab
${liabilities_liability_description_2}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_client_1}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_client_2}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_start_date}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_interest}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_fix_var}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_repayments}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_io_pi}sourced from mycrm / liabilities tab	${liabilities_liability_description_2_tax_deduction}sourced from mycrm / liabilities tab
${liabilities_liability_description_3}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_client_1}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_client_2}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_start_date}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_interest}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_fix_var}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_repayments}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_io_pi}sourced from mycrm / liabilities tab	${liabilities_liability_description_3_tax_deduction}sourced from mycrm / liabilities tab
${liabilities_liability_description_4}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_client_1}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_client_2}	${liabilities_liability_description_4_start_date}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_interest}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_fix_var}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_repayments}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_io_pi}sourced from mycrm / liabilities tab	${liabilities_liability_description_4_tax_deduction}sourced from mycrm / liabilities tab
Total								

Comments	${liabilities_liabilities_notes}sourced from mycrm / liabilities tab

NET WORTH

Total Lifestyle Assets	
+ Total Investment & Super Assets	
- Total Liabilities	
NET WORTH	

YOUR PERSONAL INSURANCE

None / Not in Scope / Not Disclosed / See attached statements / Section Not Applicable because:

Life, TPD, Trauma, Income Protection

Insurer	Policy number	Super/ Non-super	Life Insured	Owner	Cover Details				Premium per year	Premium Type	Tax Deduction
					Cover Type	Sum Insured	Waiting Period	Benefit Period			
${insurance_insurer_1} sourced from mycrm / insurance tab	${insurance_policy_1} sourced from mycrm / insurance tab	${insurance_sup_non_sup_1} sourced from mycrm / insurance tab	${insurance_life_insured_1} sourced from mycrm / insurance tab	${insurance_owner_1} sourced from mycrm / insurance tab	${insurance_cover_type_1} sourced from mycrm / insurance tab	${insurance_sum_insured_1} sourced from mycrm / insurance tab	${insurance_wp_1} sourced from mycrm / insurance tab	${insurance_bp_1} sourced from mycrm / insurance tab	${insurance_premium_per_year_1} sourced from mycrm / insurance tab	${insurance_premium_type_1} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_1} sourced from mycrm / insurance tab
${insurance_insurer_2} sourced from mycrm / insurance tab	${insurance_policy_2} sourced from mycrm / insurance tab	${insurance_sup_non_sup_2} sourced from mycrm / insurance tab	${insurance_life_insured_2} sourced from mycrm / insurance tab	${insurance_owner_2} sourced from mycrm / insurance tab	${insurance_cover_type_2} sourced from mycrm / insurance tab	${insurance_sum_insured_2} sourced from mycrm / insurance tab	${insurance_wp_2} sourced from mycrm / insurance tab	${insurance_bp_2} sourced from mycrm / insurance tab	${insurance_premium_per_year_2} sourced from mycrm / insurance tab	${insurance_premium_type_2} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_2} sourced from mycrm / insurance tab
${insurance_insurer_3} sourced from mycrm / insurance tab	${insurance_policy_3} sourced from mycrm / insurance tab	${insurance_sup_non_sup_3} sourced from mycrm / insurance tab	${insurance_life_insured_3} sourced from mycrm / insurance tab	${insurance_owner_3} sourced from mycrm / insurance tab	${insurance_cover_type_3} sourced from mycrm / insurance tab	${insurance_sum_insured_3} sourced from mycrm / insurance tab	${insurance_wp_3} sourced from mycrm / insurance tab	${insurance_bp_3} sourced from mycrm / insurance tab	${insurance_premium_per_year_3} sourced from mycrm / insurance tab	${insurance_premium_type_3} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_3} sourced from mycrm / insurance tab
${insurance_insurer_4} sourced from mycrm / insurance tab	${insurance_policy_4} sourced from mycrm / insurance tab	${insurance_sup_non_sup_4} sourced from mycrm / insurance tab	${insurance_life_insured_4} sourced from mycrm / insurance tab	${insurance_owner_4} sourced from mycrm / insurance tab	${insurance_cover_type_4} sourced from mycrm / insurance tab	${insurance_sum_insured_4} sourced from mycrm / insurance tab	${insurance_wp_4} sourced from mycrm / insurance tab	${insurance_bp_4} sourced from mycrm / insurance tab	${insurance_premium_per_year_4} sourced from mycrm / insurance tab	${insurance_premium_type_4} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_4} sourced from mycrm / insurance tab
${insurance_insurer_5} sourced from mycrm / insurance tab	${insurance_policy_5} sourced from mycrm / insurance tab	${insurance_sup_non_sup_5} sourced from mycrm / insurance tab	${insurance_life_insured_5} sourced from mycrm / insurance tab	${insurance_owner_5} sourced from mycrm / insurance tab	${insurance_cover_type_5} sourced from mycrm / insurance tab	${insurance_sum_insured_5} sourced from mycrm / insurance tab	${insurance_wp_5} sourced from mycrm / insurance tab	${insurance_bp_5} sourced from mycrm / insurance tab	${insurance_premium_per_year_5} sourced from mycrm / insurance tab	${insurance_premium_type_5} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_5} sourced from mycrm / insurance tab
${insurance_insurer_6} sourced from mycrm / insurance tab	${insurance_policy_6} sourced from mycrm / insurance tab	${insurance_sup_non_sup_6} sourced from mycrm / insurance tab	${insurance_life_insured_6} sourced from mycrm / insurance tab	${insurance_owner_6} sourced from mycrm / insurance tab	${insurance_cover_type_6} sourced from mycrm / insurance tab	${insurance_sum_insured_6} sourced from mycrm / insurance tab	${insurance_wp_6} sourced from mycrm / insurance tab	${insurance_bp_6} sourced from mycrm / insurance tab	${insurance_premium_per_year_6} sourced from mycrm / insurance tab	${insurance_premium_type_6} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_6} sourced from mycrm / insurance tab
${insurance_insurer_7} sourced from mycrm	${insurance_policy_7} sourced from mycrm	${insurance_sup_non_sup_7} sourced from mycrm / insurance	${insurance_life_insured_7} sourced from mycrm /	${insurance_owner_7} sourced from mycrm	${insurance_cover_type_7} sourced from mycrm /	${insurance_sum_insured_7} sourced from mycrm / insurance	${insurance_wp_7} sourced from mycr	${insurance_bp_7} sourced from mycr	${insurance_premium_per_year_7} sourced from mycrm / insurance tab	${insurance_premium_type_7} sourced from mycrm / insurance	${insurance_premium_tax_dedctn_7} sourced from mycrm / insurance tab

/ insurance tab	/ insurance tab	tab	insurance tab	/ insurance tab	insurance tab	tab	m / insurance tab	m / insurance tab		tab	
${insurance_insurer_8} sourced from mycrm / insurance tab	${insurance_policy_8} sourced from mycrm / insurance tab	${insurance_sup_non_sup_8} sourced from mycrm / insurance tab	${insurance_life_insured_8} sourced from mycrm / insurance tab	${insurance_owner_8} sourced from mycrm / insurance tab	${insurance_cover_type_8} sourced from mycrm / insurance tab	${insurance_sum_insured_8} sourced from mycrm / insurance tab	${insurance_wp_8} sourced from mycrm / insurance tab	${insurance_bp_8} sourced from mycrm / insurance tab	${insurance_premium_per_year_8} sourced from mycrm / insurance tab	${insurance_premium_type_8} sourced from mycrm / insurance tab	${insurance_premium_tax_dedctn_8} sourced from mycrm / insurance tab

CLIENT 1: Have you had or do you understand what a term life insurance policy is? Yes No
CLIENT 2: Have you had or do you understand what a term life insurance policy is? Yes No
user manually enters data / no need to link to mycrm

COMMENTS:

${insurance_insurance_notes} sourced from mycrm / insurance tab

GENERAL INSURANCE

Not in Scope / Not Disclosed / None / See attached statements / Section Not Applicable because:

Insurer	Cover Type	Policy number	Owner	Sum Insured		Premium per year
${insurance_gi_insurer_1} sourced from mycrm / insurance tab	${insurance_gi_cover_type_1} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_1} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_1} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_1} sourced from mycrm / insurance tab
${insurance_gi_insurer_2} sourced from mycrm / insurance tab	${insurance_gi_cover_type_2} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_2} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_2} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_2} sourced from mycrm / insurance tab
${insurance_gi_insurer_3} sourced from mycrm / insurance tab	${insurance_gi_cover_type_3} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_3} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_3} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_3} sourced from mycrm / insurance tab
${insurance_gi_insurer_4} sourced from mycrm / insurance tab	${insurance_gi_cover_type_4} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_4} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_4} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_4} sourced from mycrm / insurance tab
${insurance_gi_insurer_5} sourced from mycrm / insurance tab	${insurance_gi_cover_type_5} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_5} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_5} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_5} sourced from mycrm / insurance tab
${insurance_gi_insurer_6} sourced from mycrm / insurance tab	${insurance_gi_cover_type_6} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_cover_type_6} sourced from mycrm / insurance tab	${insurance_gi_sum_insured_6} sourced from mycrm / insurance tab	${insurance_} sourced from mycrm / insurance tab	${insurance_gi_premium_per_year_6} sourced from mycrm / insurance tab

ABOUT YOUR FINANCIAL POSITION

	Client 1	**Client 2**
At what age would you like to retire?		
What is your desired retirement income (p.a.)?		
What are your past experiences with investing, if any?		
Are there any types of investments you would like to include or avoid in your portfolio (e.g. for ethical reasons)?	If yes, please provide details:	If yes, please provide details:
How long before you think you will need to access your investments?	Access Now Less than two years Between two and five years Between five and seven years Greater than seven years	Access Now Less than two years Between two and five years Between five and seven years Greater than seven years
When selecting a product or platform, what is more important to you, is it the cost or quality of features?	Cost Quality of features	Cost Quality of features
How do you intend on funding your retirement?	Super Age Pension	Super Age Pension
What measures are you prepared to take in the event you fall short of your retirement goals?	Have enough money & sources of income for retirement Other: extend working life / work part time / spend less in retirement	Have enough money & sources of income for retirement Other: extend working life / work part time / spend less in retirement

user manually enters data into this page / no need to link to mycrm

SUPERANNUATION DETAILS – CLIENT 1

See attached statements
None / Not in Scope / Not Disclosed

Client 1	**Fund 1**	**Fund 2**	**Fund 3**	**Fund 4**
Fund name				
Member number				
Type	Accumulation Defined Benefit	Accumulation Defined Benefit	Accumulation Defined Benefit	Accumulation Defined Benefit
If defined benefit: Super salary Multiple Retirement age				
Balance Taxed: Untaxed: Tax free:				
Date of balance				
Date fund commenced				
Eligible service date				
Death nomination in place	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None
Super Contribution Guarantee amount				
Other concessional contributions				
Non-concessional contributions				
Insurance cover Life: TPD: IP:	Life TPD IP WP BP	Life TPD IP WP BP	Life TPD IP WP BP	Life TPD IP WP BP
Insurance premiums:				
Fees payable: Management Administration Member fees				

user manually enters data into this page / no need to link to mycrm

SUPERANNUATION DETAILS – CLIENT 2

See attached statements
None / Not in Scope / Not Disclosed

Client 2	**Fund 1**	**Fund 2**	**Fund 3**	**Fund 4**
Fund name				
Member number				
Type	Accumulation Defined Benefit	Accumulation Defined Benefit	Accumulation Defined Benefit	Accumulation Defined Benefit
If defined benefit: Super salary Multiple Retirement age				
Balance Taxed: Untaxed: Tax free:				
Date of balance				
Date fund commenced				
Eligible service date				
Death nomination in place	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None
Super Contribution Guarantee amount				
Other concessional contributions				
Non-concessional contributions				
Insurance cover Life: TPD: IP:	Life TPD IP WP BP	Life TPD IP WP BP	Life TPD IP $ WP BP	Life TPD IP WP BP
Insurance premiums:				
Fees payable: Management Administration Member fees				

user manually enters data into this page / no need to link to mycrm

PENSION DETAILS – CLIENT 1

See attached statements
None / Not in Scope / Not Disclosed

Client 1	**Fund 1**	**Fund 2**	**Fund 3**	**Fund 4**
Fund name				
Member number				
Owner				
Type	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity
Balance Taxable / Tax-free				
Income payment				
Payment frequency				
Fees payable: MER / Admin / Other				
Reversionary to Spouse	Yes No	Yes No	Yes No	Yes No
Death nomination in place	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None

PENSION DETAILS – CLIENT 2

See attached statements
None / Not in Scope / Not Disclosed

Client 2	**Fund 1**	**Fund 2**	**Fund 3**	**Fund 4**
Fund name				
Member number				
Owner				
Type	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity	ABP Term Allocated TTR Annuity
Balance Taxable / Tax-free				
Income payment				
Payment frequency				
Fees payable: MER / Admin / Other				
Reversionary to Spouse	Yes No	Yes No	Yes No	Yes No
Death nomination in place	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None	Binding Non-Binding Non-Lapsing None

user manually enters data into this page / no need to link to mycrm

CLIENT DECLARATION

- I/We acknowledge that we have been given a Financial Services Guide and Adviser Profile by the adviser who will prepare my/our Statement of Advice.
- I/We hereby declare that the information contained in this form is true and correct to the best of my/our knowledge. My/our financial adviser has explained to me/us the information necessary to assess my/our circumstances and provide advice in respect to my/our objectives. I am / We are not aware of any other information that I/we have failed to disclose to the person to whom this form has been given which would be relevant to the preparing of my/our Statement of Advice.
- I/We give our permission for this information to be used for the preparation of my/our financial plan and I/we understand that the investment recommendations will be based solely on the information supplied in this form and any supporting documents provided.
- I/We understand that if the information contained in this form relating to our relevant circumstances is, or becomes incomplete or inaccurate, then the advice contained in the Statement of Advice may not be appropriate for me/us, and that, before acting on the advice, I/we need to consider the appropriateness of the advice, taking into account my/our objectives, financial situation and needs.
- I/We understand that our Tax File Number(s) is/are collected and stored as they may be requested by financial institutions for purposes related to my/our superannuation and/or investments. If I/we have provided our Tax File Number(s), I/we authorise my/our financial adviser or another representative of yourwealthplanner to provide, acting on my/our behalf, my/our Tax File Number when requested for these purposes (unless I/we have notified my/our financial adviser in writing otherwise, either in relation to a particular instance or generally).
- I/We understand that in the interest of efficient and accurate record keeping yourwealthplanner may record my/our discussions from time to time and will retain any such recordings on file.

- **I/We agree to pay my/our Financial Adviser a Statement of Advice Preparation Fee of 0 including GST.**

Client 1	sourced from mycrm		
	Name	Sign	Date
Client 2	sourced from mycrm		
	Name	Sign	Date
Adviser	ANDREW BELL		
	Name	Sign	Date