

INITIAL DISCUSSION SHEET

Personal Details

Title: _____ Given Name: _____
Surname: _____
DOB: _____
Employer: _____
Occupation: _____
Ph: (W) _____ (H) _____
Mobile: _____ Fax: _____
Email: _____
Address: _____

Title: _____ Given Name: _____
Surname: _____
DOB: _____
Employer: _____
Occupation: _____
Ph: (W) _____ (H) _____
Mobile: _____ Fax: _____
Email: _____

Dependants: Y / N Number: _____ Ages: _____

Income & Expenditure

Salary: _____
Other Income: _____

Salary: _____
Other Income: _____

Expenditure Summary: _____

Assets & Liabilities

Principal Residence – ownership, estimated value, mortgage value and provider:

Personal & Other Loans (\$ value): _____

Investments – including properties, shares, managed funds, term deposits, cash (\$ value):

Superannuation (\$ value, provider, investment option selected):

Personal Insurance – any Life, Total & Permanent Disability (TPD), Income Protection or Trauma cover and value:

Your Financial Goals & Objectives (e.g. preferred retirement age, retirement income goal, etc):

Other relevant information:

The information collected on this form is for our use only and will not be disclosed to any third party without your prior consent.

Please return email to cheyne.peat@morgans.com.au or return fax to (03) 9321 1137