INVESTAX

Strategic Consultation
Client Information Form

Investax Group
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Email: info@investax.com.au

An Investax Strategic Consultation is a holistic review of your wealth creation goals, taking into account issues around tax, asset protection, estate planning, finance and structures, to assist you in meeting your objectives.

1. Enter your name here

2. Fill out the **Order Form**.

3. Attach any relevant documents or extra notes.

4. Please indicate the **most preferable time** and days for your Strategic Consultation

Day: ______________________________ (between Mon-Fri) Time: ________________________________ (between 9am-3pm)

Office: Suite 102, Level 1, 102/276 Pitt St, Sydney NSW 2000

Phone: 02 8651 8000

5. Send all completed forms by:

Email: info@investax.com.au

We will be in touch with you shortly to schedule your appointment.

Kind Regards
Ershad Ullah | Managing Partner | Investax Group

Property, Business and Tax Accountants

Strategic Consultation

Client Information Form

INVESTAX

Services

Strategic Consultation			
Advanced Strategic Consultation			
Prices Include GST	Total (Inc GST)		

Payment Details

Credit Card ☐ MasterCard ☐ VISA ☐ Other Expiry Name on Card

Card Number

Amount $ CVV Signature

Cheque

Direct Deposit

BSB:

Account Number:

Account Name:

Reference:

What information and knowledge do you hope to gain from your consultation?

Not a Financial Plan

Information provided by us to you during your consultation or financial strategic Consultation is of a general nature and not intended to be nor purported to be financial advice. Investax Group or any of the director/s, officers, employees, licensees or contractors) are NOT Australian Financial Services Licensees authorised to provide financial product advice or deal in financial products including SMSF. Any discussion during a Financial Strategic Consultation or other consultation about superannuation, shares, managed funds, investments, or similar topics are only made in the context of accounting and taxation and should not be taken to be general or personal financial advice to you. You must not act on any matter discussed without taking professional advice from a licensed financial planner who will take due regard to your specific and particular needs.

At your request Investax Group may also refer you to Investax Group for specific loan product information.

Agency Agreement

You appoint Investax Group or its related companies or any of their directors, officers, employees or licensees ("Investax Group") as your agent to undertake communication or correspondence with any required legal advisor to provide you with legal advice. Investax Group will maintain the confidentiality of any communications or correspondence so created within the law and use such information in furtherance of your requirements.

Privacy / Communication Agreement

It is our policy not to sell or pass on any personal information that you may have provided to us unless we have your express consent to do so. Your details will be added to the Investax Group data base and you will receive communications from Investax Group in the form of newsletters, tax notifications and promotional material. You can opt out by selecting unsubscribe.

From time to time, we may receive requests to furnish your financial details to third parties. In order to comply with privacy laws please acknowledge that we are able accept your verbal authority as legal confirmation in these circumstances. An exception to this is where Investax Group may be required by law to disclose certain information.

CLIENT ACKNOWLEDGEMENT AND AGREEMENT OF ABOVE BY SIGNATURE BELOW: (To be signed in the office)

1. CLIENT SIGNATURE:

2. CLIENT SIGNATURE:

DATE:

Property, Business and Tax Accountants

Strategic Consultation

Client Information Form

INVESTAX

Client Details

	Title	First Name	Surname	D.O.B	Age	Sex (M/F)	Relationship
1							*Client 2*
2							*Client 1*

Address	Suburb	State	Post Code
Home			
Postal			

Address	
1	
2	

	Phone	Work	Mobile	Email Address
1				
2				

	Dependant / Child's Name	Age	Sex	Living at home Y/N	Salary	Comments
1						
2						
3						
4						

How did you hear about Chan & Naylor?

☐ Book ☐ Seminar ☐ Website ☐ Reffered ☐ Email

If Friend /Family, have they had a Financial Strategic Consultation? **Y / N** Who they saw:

OTHER:

Client Information Form
Income Details

Tell us about your business

	Business Name	Description	Corporate Structure (attach hand drawn picture on page 9 if necessary)	Ownership Details	Turnover $000	Business Assets	Value of Business Assets $000	No. of Employees	Date Started
1									
2									
3									
4									

Tell us about your employment

	Client Name	Job Description	Dated Started	Salary $000	Bonuses $000	Qualifications	Additional Super Contributions	Comments
1								
2								
3								
4								

Client Information Form

Property Investment Details

Do you have any property?

Property Details (include your Principal Place of Residence)

	Suburb	State	Ownership Details	Property Type	Date of Purchase	Purchase Price $000	Current Market Value $000	Debt $000	Loan Type/ Lender	Equity $000	Weekly Rental Income	Depreciation Claimed?	Have you lived in this property?
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													

What are your future property investment plans?

Comments

Client Information Form

Shares and Managed Funds Details

Do you own any Shares or Managed Funds?

Share/Managed Funds Details

	Name	Ownership Details	Date of Purchase	Total Value of Purchase $000	Current Market Value $000	Debt $000	Loan Type	Equity $000	Dividend	Holding or selling?
1										
2										
3										
4										
5										
6										
7										
8										
9										

What are your future shares or managed funds investment plans?

Would you like an analysis of your future shares and managed funds plans by a Chan & Naylor Financial Planner?	Yes ☐	Not Yet ☐	Never ☐
Comments			

Client Information Form
Other Assets and Liabilities Details

Lifestyle Assets	Description	Value ($)	Owner
Home Contents			
Motor Vehicle(s)			
Other Vehicle(s)			
Collectibles/Antiques			
Other			
Other			
Total		$	

Superannuation Assets	Superannuation Provider (SMSF, Industry, Retail, etc)	Insurance Yes / No	Current Value	Owner
Superannuation 1			$	
Superannuation 2			$	
Superannuation 3			$	
Superannuation 4			$	
Total			$	

Liabilities	Balance Owing ($)	Lender	Interest Rate (%)	Repayment Amount	Repayment (P&I–I/O)	Owner
Mortgage						
Personal loan(s)						
Credit Card(s)						
Credit Card(s)						
Business Loan(s)						
Lease(s)/rental agreement						
Other						
Other						
Total	$			$		

Client Information Form
Objectives

In what areas do you require assistance and what's important about money to you?

Please describe what you would like to achieve over the following timeframes:

Short Term (Immediate):

Medium Term (2 - 5 years):

Long Term (5yrs +):

Client Information Form
Insurances & Wills

Insurances – Do you have:				
Life Insurance?	☐ **No** go to next question	**Yes** ☐		**Approximate Insured Value** **$**
Income Protection?	☐ **No** go to next question	**Yes** ☐		**Approximate Insured Value** **$**
Trauma Insurance?	☐ **No** go to next question	**Yes** ☐		**Approximate Insured Value** **$**
Would you like a free analysis of your various insurances by a **Investax Group** planner ?				☐ Yes ☐ Not Yet ☐ NO
Will – Do you have a will?	☐ Yes ☐ No	**Do you Have Enduring Powers of Attorney?**	☐ Yes ☐ No	

Notes and Diagrams