FUTURE KEY FINANCIAL

Expert advice. Genuine care.

CONGRATULATIONS ON TAKING THE FIRST STEP TO IMPROVE YOUR FINANCIAL FUTURE!

By completing this *About You Questionnaire* and engaging with our services, we will help you create a financial foundation, clarifying and prioritizing what you want from life. Balancing the things you need money for today and educating you to make sound financial decisions that cater for your financial future - without sacrificing all the good things in life today.

FEEDBACK FROM OTHER CLIENTS

★★★★★

"We can't recommend Emily Matthews enough! So friendly, incredibly diligent and she really knows her stuff. She actually listened to our goals and tailored her advice to exactly what we needed, plus recommended some tax friendly saving strategies that were weren't aware of. She also saved us hundreds of dollars per year in excess fees. She explained everything to us clearly and kept us up to date throughout the whole implementation process. She is highly recommended." – Kelly (Google Review)

★★★★★

"Thank you does not seem enough to say to you both but a BIG thank you anyway. I feel so very safe in the hands of Daniel and your personally selected staff at Future Key Financial. You guys are awesome.
I feel secure in the financial advice you give me. The quarterly reviews are very informative, detailed and reassuring that we are heading in the right direction for my financial future. It is comforting to know that your staff are always available to assist me whether that be via personal contact, a phone call or an email. I find staff are very knowledgeable and resourceful.
How lucky am I to be a client of Future Key Financial." - Chris (Google Review)

★★★★★

"Emily has given us advice in areas including cashflow management, superannuation and investment planning. She has a broad knowledge of all financial planning aspects and was able to answer any questions we had. Through Emily's knowledge and experience, I am very confident that her advice is right for us." – Sam (AdviserRatings Review)

★★★★★

"Emily proved to have a really thorough understanding of our situation, both in personal and our business operations. She produced a comprehensive plan that took the guesswork out of planning for the future and managing our finances today." – Erin & Andrew (Website Review)

ABOUT YOU QUESTIONNAIRE

Please take the time to complete this document as thoroughly as possible. We use this information to develop our advice to you. If any part of the questionnaire is not relevant, please write "*N/A*" in the space provided. Please also feel free to attach any extra documents that you feel are relevant.

Completed forms can be sent to us via:

Email: unlock@futurekeyfinancial.com.au
Post: PO Box 1089, Lutwyche QLD 4030

Personal Details

CLIENT 1

Title	Given Name(s)	Last Name

Smoker?	Date of Birth	Health

Marital Status	TFN (Optional*)

Phone	Mobile

Email	Fax

CLIENT 2

Title	Given Name(s)	Last Name

Smoker?	Date of Birth	Health

Marital Status	TFN (Optional*)

Phone	Mobile

Email	Fax

Home Address

	Suburb	State	Postcode

Postal Address

	Suburb	State	Postcode

DEPENDANTS

Full Name	Date of Birth	Relationship

Do you expect to have any or more dependants in the next 12 months?

* You may choose not to provide this information to us and pass this directly to the product providers. Please refer to the following links for more information: Tax File Number and Privacy fact sheet 6: Protecting your TFN information.

Income and Expenses

Please provide specific information about your financial circumstances. Please let us know of any and all other information that is relevant to your financial situation. Please feel free to attach other documents to this questionnaire.

CLIENT 1

Employment Status	Occupation

Employer	Salary (ex. super)

Other Income

Business	
Trust Income	
Superannuation Income Stream	
Centrelink	
Rental	
Dividends	
Other (please specify)	

CLIENT 2

Employment Status	Occupation

Employer	Salary (ex. super)

Other Income

Business	
Trust Income	
Superannuation Income Stream	
Centrelink	
Rental	
Dividends	
Other (please specify)	

Do you expect to inherit any major amounts in the next five years?

Is there any other further information about your income that we should know?

Annual combined living expenses?

Do you anticipate any major expenses in the next five years? If so, please briefly describe.

Assets

For example: Bank Accounts, Home, Investment Property, Managed Funds, etc.

Asset Name / Description	Current Value	Cost	Date Acquired	Owner

Liabilities

For example: Mortgage, Investment Loans, Credit Cards, Personal Loans, Leases, etc.

Debt	Amount Owed	Interest Rate %	Owner

Notes on Assets and Liabilities

Superannuation

Fund Name	Current Balance	Owner

Personal Risk Insurance

Type of Insurance	Insurer	Amout of Cover	Annual Premium	Owner

Are you happy with your current personal insurances?

Medical Reasons why you might be unable to obtain, increase or change your personal insurance cover?

If yes, please detail below:

Estate Planning

CLIENT 1

Do you have a will?	Last reviewed
	/ /

Do you have powers of attorney?	Last reviewed
	/ /

Do you have a solicitor?

Do any of your beneficiaries need particular protection in your will?

CLIENT 2

Do you have a will?	Last reviewed
	/ /

Do you have powers of attorney?	Last reviewed
	/ /

Do you have a solicitor?

Do any of your beneficiaries need particular protection in your will?

Your Objectives

In this section, tell us in your own words what you would like us to help you with.

General Information on your current financial & lifestyle position.

Short Term Goals (next 12 months)

Medium Term Goals (next 5 years)

Long Term Goals (after next 5 years)

Additional Notes