

FACT FINDER

Fill in our simple personal fact finder, find out where you are today, where you might be tomorrow and where you might need a bit of help.

DISCLAIMER

Completion of this fact finder is for your personal use only and should not be construed as providing a financial advice in any way.

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YOUR INCOME

	CURRENCY	MONTHLY/ANNUALLY	SELF	PARTNER	JOINT
Basic Earned Income					
Bonus/Commission					
Housing Allowance					
Annual Bonus					
Pension Income					
Investment Income					
Other					
		TOTAL INCOME			

YOUR RETIREMENT

Age you want to retire?			
Remaining years until retirement?			

YOUR EXPENDITURE

	CURRENCY	MONTHLY/ANNUALLY	SELF	PARTNER	JOINT
Mortgages/Rent					
Utilities					
Saving/Pension					
Education					
Loans/Credit Cards					
Travel					
Food					
Other Payments					
		TOTAL FIXED EXPENDITURE			
Entertainment					
Holiday/Breaks					
Other Payments					
		TOTAL MONTHLY EXPENDITURE			

INCOME LESS EXPENDITURE

TOTAL MONTHLY/DISPOSABLE INCOME			
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CURRENT ASSETS

	SELF/PARTNER/JOINT	BANK	ANNUAL INCOME	INCOME CURRENCY	CONVERSION VALUE
Main Account					
Account (1)					
Account (2)					
Account (3)					
Account (4)					
Account (5)					
Account (6)					
TOTAL CURRENT ASSETS					

PROPERTY ASSETS

	SELF/PARTNER/JOINT	VALUE OF PROPERTY	INCOME RECEIVED	INCOME CURRENCY	CONVERSION VALUE
Home Residence					
Rental Property					
Rental Property					
Rental Property					
Rental Property					
Other					
Other					
ESTIMATED TOTAL PROPERTY ASSETS					

REGULAR SAVINGS/PENSION PLANS

SELF/PARTNER JOINT	CONTRIBUTIONS MONTHLY/ANNUALLY	TERM OR RETIREMENT AGE	INCOME CURRENCY	CONVERSION VALUE
ESTIMATED TOTAL VALUE				

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CURRENT LIABILITIES

	SELF/PARTNER/JOINT	FINANCE PROVIDER	TYPE OF LOAN	OUTSTANDING	BALANCE IN HOME
Home Residence					
Personal Loans					
Car Payments					
Credit Cards					
Overdraft					
Rental Property					
Other					
Other					
TOTAL CURRENT LIABILITIES					

ESTIMATED NET WORTH

ESTIMATED NET WORTH		
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RETIREMENT PLANNING

	SELF	PARTNER
What age would you like to retire?		
Where do you plan to retire to?		
What monthly amount would you like to receive in retirement?		
Do you think your current retirement fund/plan is adequate?		

INSURANCE COVER

DO YOU HAVE ANY OF THE FOLLOWING?	SELF			PARTNER		
Life Insurance	Y	/	N	Y	/	N
Critical Illness Cover	Y	/	N	Y	/	N
Healthcare Insurance	Y	/	N	Y	/	N
Hostile Environment Cover	Y	/	N	Y	/	N

IMPORTANT QUESTIONS TO ASK YOURSELF...

- 1/ Do I have a slush/rainy day money/emergency cash to put to one side?
- 2/ Where would I like to live when I retire?
- 3/ Do I want more children?
- 4/ Do I want to change jobs, if so do I need to retrain?
- 5/ Do I want to move house?
- 6/ Do I want to renovate/extend my house?
- 7/ How much would I like my retirement fund to give me each month?
- 8/ How much credit card/overdraft/loans debt do I have, and do I have a plan to pay it off?
- 9/ Have I got a goal, if so how am I going to achieve it?
- 10/ Have I designed my own flexible finance plan yet?