

## Snapshot



Client Name:

Date Completed:

Adviser Name:



## Privacy Statement

Private and Confidential

### Important Notice

Before we are able to provide any financial or credit service, your adviser must collect and hold personal information relevant to your personal and financial situation, your personal and financial needs and objectives, and the service to be provided. The information requested in this Fact Find will be used for this purpose.

This Fact Find will ideally be completed by you prior to our meeting. This will help us to understand your overall position and goals, and to focus on the things that are important to you during our meeting.

Failure to provide accurate, complete and up-to-date information may result in your adviser giving advice or providing a service that may be inappropriate and/or not in your best interest. As a consequence you may lose the right to seek compensation from your adviser and/or Infocus for any loss you may suffer.

To provide the best possible service to you we will, from time to time use personal information provided by you to inform you of products and services which may be of interest to you unless you tell us not to.

### Your Privacy

Your adviser and Infocus are committed to maintaining the privacy of your personal information at all times. We collect and hold personal information for the purpose of providing the services you have requested from us and to allow us to meet our obligations under the law. Your adviser, Infocus and our associated entities adhere to the Australian Privacy Principles.

Our privacy policy sets out a range of information that allows you to understand the kinds of information we collect and hold; how that information is collected and held and the purpose for which we collect, hold, use and disclose that information including if that disclosure is made in a foreign country. The policy also sets out how you can access and correct the information we hold. It also includes information on how to make a complaint if things go wrong and how we will address your issues.

Our standard practice is to deliver a copy of our current privacy policy in every case before we provide a service and when this is updated. It is also available here <http://www.infocus.com.au/privacy-policy> Feel free to contact your adviser or our Privacy Officer if you have any questions.

Privacy Officer

Post PO Box 1856 Sunshine Plaza 4558

Phone **07 5458 9400**

Email **ProfessionalStandards@Infocus.com.au**

## Personal Details

	Client One	Client Two
Name:	<input type="text"/>	<input type="text"/>
Preferred Email Address:	<input type="text"/>	<input type="text"/>
Preferred Contact Phone Number:	<input type="text"/>	<input type="text"/>
Address:	<input type="text"/>	<input type="text"/>
Date of Birth:	<input type="text"/>	<input type="text"/>
Occupation:	<input type="text"/>	<input type="text"/>
Employment Status:	<input type="text"/>	<input type="text"/>
Annual Salary:	<input type="text"/>	<input type="text"/>
Rental Income:	<input type="text"/>	<input type="text"/>
Dividends:	<input type="text"/>	<input type="text"/>
Business Profits:	<input type="text"/>	<input type="text"/>

---



## Goals

	When	Amount	Notes
Funding for Children's Education:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt Reduction / Pay off Mortgage:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Travel / Holiday:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Buying / Selling your home:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Car / Boat / Caravan:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Renovations:	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Other (please state)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Other (please state)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Other (please state)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Other (please state)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Retirement Objectives

	Client One	Client Two
When Would You Like to Retire?	<input type="text"/>	<input type="text"/>
Expenditure in or Leading up to Retirement:	<input type="text"/>	<input type="text"/>
Ideal Income Desired in Retirement:	<input type="text"/>	<input type="text"/>
Additional Retirement Lump Sum:	<input type="text"/>	<input type="text"/>
Centrelink on Retirement?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Personal Insurances

	Client One	Client Two
Death / Life:	<input type="text"/>	<input type="text"/>
Total & Permanent Disablement (TPD):	<input type="text"/>	<input type="text"/>
Trauma / Recovery / Critical Illness:	<input type="text"/>	<input type="text"/>
Income Protection / Salary Continuance:	<input type="text"/>	<input type="text"/>