

# Crosby Dalwood & Co

## Client Survey Form

Date: \_\_\_\_\_  
Time: \_\_\_\_\_  
Accountant: \_\_\_\_\_  
Client Code: \_\_\_\_\_

Client Name: \_\_\_\_\_

Would you like to receive a copy of the Count Report via: - Mail  Email

Email address: \_\_\_\_\_

### FINANCIAL PLANNING

Do you have a Financial Adviser? Yes  No   
Do you have any investments? Yes  No   
Do you receive Govt Pension/Allowances? Yes  No   
Are you aware that we can assist you in selling or purchasing shares? Yes  No   
Would you like to see what all of your investments are worth in one report? Yes  No

### LOANS

Do you own: - a Home  a Rental Property   
Do you have a home loan? Yes  No   
Do you have an investment property loan? Yes  No   
Do you have any other investment loans? Yes  No   
Do you want information on Home/Business/Investment Loans? Yes  No

### BUSINESS OWNERS

Are you a Business Owner? Yes  No   
Do you have a Business Loan? Yes  No   
Do you have Business Expense Insurance? Yes  No   
Have you financed any motor vehicles or equipment in the last 12 months? Yes  No   
Are you planning to finance motor vehicles or equipment in the next 12 months? Yes  No   
Do you want information on Business Loans, Insurance or Leasing? Yes  No

### INSURANCE

Do you have: - Income Protection  Life Insurance  Trauma Insurance   
Do you want advice on Personal Insurance? Yes  No

### SAVINGS PLAN

Do you save money regularly? Yes  No   
Would you like to discuss options regarding your regular savings? Yes  No

### SUPERANNUATION

How many different Superannuation Funds are you a member of? \_\_\_\_\_  
Would you like us to assess whether you have made the best choice of funds? Yes  No   
Does your employer allow you to select where your Superannuation goes? Yes  No   
Do you know how much income you will need when you retire? Yes  No   
Planned retirement age? \_\_\_\_\_

Would you like to speak to one of Crosby Dalwood & Co's Financial Planning Specialists? Yes  No