

FINANCIAL PLANNING CHECKLIST

Savings

Tick if required

- I would like to maximise my savings potential
- I would like to save in a tax effective environment
- I would like to consider Instalment Gearing

Wealth Creation Strategies

- I would like to utilise the equity in my home to create wealth
- I would like to enhance the performance of my investment portfolio
- I would like to find out more about property investing
- I would like to find out more about share investments
- I would like to discuss debt reduction strategies
- I would like to know direct and managed investment options

Superannuation Strategies

- I would like to know more about the Government Co-contribution
- I would like to know more about spouse contributions rebate
- I would like to know more about salary sacrifice
- I would like to know more about the small business Capitals Gains Tax relief

Business Superannuation

- I would like an easy way to pay Superannuation contributions for employees
- I would like a better administration facility
- I would like to give my employees more encompassing benefits

Family Risk Planning

- I would like to ensure my income is protected against sickness or disability
- I would like to repay debt in case of death, disability or major trauma
- I would like to know more about insuring for family security
- I would like to protect my financial position from major traumas
- I would like to arrange my insurances in a more tax effective manner

Retirement Strategies

- I would like to know more about retirement income streams
- I would like to obtain more Centrelink benefits

Business Risk Planning / Asset Protection

- I would like to buy out my business partner in case of his/her death or disability
- I would like to know more about Key person insurance
- I would like to organise our business insurance in a more tax effective manner
- I would like to know more about buy sell agreements
- I would like to ensure the equity in my property is protected from creditors / litigation

Estate Planning

- I would like to ensure my estate documents are complete and properly drafted
- I would like to explore options to ensure assets of my estate are protected and distributed as tax effectively as possible (eg. the use of testamentary trusts)

Please email completed form to mail@hoffmankelly.com.au if you wish to arrange an interview with HKS Financial Planning.

NAME _____ Phone Number _____