



INSURANCE & SUPERANNUATION CHECKLIST

With the ever-changing climate of the financial industry, sometimes it pays to have someone to help. Whether you are looking to set up your own SMSF, or want SMSF investment advice, would like a wealth creation plan or wealth protection – Life Insurance etc,

ABF Financial Planning would like to help you achieve your financial goals and help try to turn your dreams into a reality. Financial Planning is for everyone, it's not just to help the rich get richer. We want to help everyday people achieve their financial goals and attain their dream retirement lifestyle.

Would you like ABF Planning to contact you to review your insurance and superannuation? Yes / No

If yes, please complete the following details and send to our office;

Full Name: _____

Date of Birth: ____ / ____ / _____ Occupation: _____

Job Title: _____ Industry: _____

Work at heights? Yes / No up to _____ meters

Annual Income: \$ _____ Last year's Annual Income: \$ _____

Height: _____ cm Weight: _____ kg Smoker / Non-Smoker / Quit in the previous 12 months

Insurance

Life Insurance: Y / N Cover \$ _____ Company: _____

TPD: Y / N Cover \$ _____ Company: _____

Trauma/Critical illness: Y / N Cover \$ _____ Company: _____

Income Protection: Y / N Cover \$ _____ Company: _____

Superannuation Fund

Rate the performance of Superannuation: Excellent / Good / Poor / Don't know

Name of Superannuation Fund: _____ Balance in Super: \$ _____

Is your insurance inside your Super Fund? Yes / No / Don't know

Hobbies/pass times such as football, netball, coaching kids sports, aviation

Duty of Disclosure: It is in your best interest to disclose everything, even if you think it is not relevant. If you make a claim and it is discovered that you did not disclose something, your insurance will be considered null and void, your insurance will be cancelled and you will not be paid anything.