Data Collection Your Personal Details

Client 1			Client 2		
Full Name			Full Name		
Date of Birth			Date of Birth		
Martial Status			Martial Status		
Gender	☐ Male	☐ Female	Gender	☐ Male	☐ Female
Residential Address			Residential Address		
Postal Address			Postal Address		
Phone			Phone		
Mobile			Mobile		
Email			– Email		
Preferred Method of Contact	☐ Phone	☐ Mobile ☐ Email	Preferred Method of Contact	☐ Phone	☐ Mobile ☐ Email
Occupation			Occupation		
Qualifications			Qualifications		
Employer			Employer		
Employment Status			Employment Status		
Taxable Income			Taxable Income		
Tax File Number			Tax File Number		
Health Issues			Health Issues		
Smoker Status	☐ Smoker	□ Non-Smoker	Smoker Status	□ Smoker	□ Non-Smoker
Height / Weight			Height / Weight		
Hazardous Pursuits			Hazardous Pursuits		
Dependants / 0	Childre	1	_		
	1	2	3	4	5
Full Name					
Date of Birth					
Gender	☐ Male ☐ Female	□ Male □ Female	☐ Male ☐ Female	□ Male □ Female	□ Male □ Female
Relationship (adopted, step children)			Unit 11, 162 Colin Street, West I		i cinaic

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T 08 6336 9700 | www.successionmatters.com.au

E estate@successionmatters.com.au | insurance@successionmatters.com.au | claims@successionmatters.com.au

Lasarith Pty Ltd atf Smith Family Trust trading as Succession Matters

AFSL No. 433938

MATTERS

Data Collection Your Personal Details

Financial Info	rmation	(if appli	cable)							
Business Name	ABN / ACN SMSF ABN									
SMSF Name										
SMSF Trustee Name	SF Trustee Name					Trustee ABN				
Current Insur	rances									
Life Insured	Policy	y Owner	Provider Policy No		Cover		Premium			
						\$				
						\$				
						\$				
						\$				
Estate Plannii	ng									
Current Will	☐ Yes	□No	PoA in Pla	ce	☐ Yes	□No				
Date of Will			Guardians	hip in Place	☐ Yes	□No				
Location of Will			Testamen	Testamentary Trust		□No				
Comments/N	otes									

