



FINANCE CONTROL

GOALS - OBJECTIVES - ADVICE - LIFESTYLE

“There are those who travel and those who are going somewhere. They are different, and yet they are the same. Successful people have this over their rivals: they know where they are going” – **Mark Caine**

Your Financial Journey

_____ and _____

As a first step in taking control of your financial future, we encourage to take some time with your partner to talk through and begin to document your financial journey.

What has prompted you to seek financial advice?

What's important to you about money?

Ph: 4276 2557

www.financecontrol.com.au

Putting YOU in control of you financial future

Financial Goals and Objectives

Short-term (under 3 years e.g. tax bill, travel, new vehicle, home improvements, education)

Purpose	Date Required	Amount
	/ /	\$
	/ /	\$
	/ /	\$

Medium-term (3 to 7 years e.g. travel, new vehicle, home improvements, education)

Purpose	Date Required	Amount
	/ /	\$
	/ /	\$
	/ /	\$

Long-term (7 years and over e.g. new vehicle, home improvements, university education)

Purpose	Date Required	Amount
	/ /	\$
	/ /	\$
	/ /	\$

If we could help you achieve these goals what would that mean to you personally?

Retirement Details

Ideally, what would retirement be like and how would you like to spend your retirement?

	Client	Client
Retirement date:	/ /	/ /
Retirement age:		

Retirement Income Goals

Expressed in today's dollars, what annual level of income (after tax) do you wish to retire on?	\$
What sources of income do you expect to rely on in retirement?	
Are you on track?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
If yes how have you measured this?	

Where Am I today

<p style="text-align: center;">Cash Reserves</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p style="text-align: center;">Investments / Assets</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p style="text-align: center;">Debt</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p style="text-align: center;">Insurances</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

What to bring:

- Your Financial Journey document
- Your home budget planner;
- Pay advice;
- Home Loan Statements;
- Share transaction statements or dividend statements;
- Superannuation statements;
- Investment statement;
- Insurance statements for life, total & disablement and income protection;
- A copy of your Will

Our aim is
to provide
knowledge,
quality advice
and
guidance
to ensure
clients take control
of their **financial life.**



Financial
Planning
ISO 9001 Lic24853

**Finance Control – The first Financial Planning
Business in NSW to achieve FP9000 – the
international standard for financial planners**



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