

Take our 60 Second FINANCIAL HEALTH CHECK



At Cii Group, the long-term security and prosperity of our clients is paramount. Simply complete the questionnaire and personal details below, and return to one of our friendly staff for a complimentary, obligation free appointment with one of the Financial Planning team.

Investment

| | NO | YES | DON'T KNOW or NOT REALLY |
|--|-----------------------|-----------------------|--------------------------|
| Do you have any savings and/or investment plan(s)? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you feel comfortable with the range of investments in your portfolio? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Has a qualified financial planner reviewed your investment portfolio recently? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Retirement & Superannuation

| | | | |
|---|-----------------------|-----------------------|-----------------------|
| Do you know at what age you would like to retire? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you think you are on track to meet your retirement lifestyle requirements? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Will your superannuation be enough to fund 30 years in retirement? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Insurance & Wills

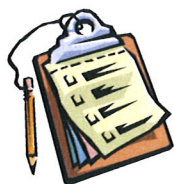
| | | | |
|---|-----------------------|-----------------------|-----------------------|
| Do you have insurance to cover your income if you are sick or unable to work? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you have insurance to provide for your loved ones in the event of your death? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Do you have a Will and Power of Attorney that accurately reflect your current wishes? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Mortgage

| | | | |
|--|-----------------------|-----------------------|-----------------------|
| Do you feel your mortgage could be working smarter for you? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Would you like to review your current mortgage & other finances? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Overall Situation

| | | | |
|---|-----------------------|-----------------------|-----------------------|
| Would it help to have a financial road map to follow? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Have you set specific financial and lifestyle goals for yourself and your family? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



Take Action!
Book in for a Free Needs Analysis NOW!

Telephone: Preferred Appointment Day: Preferred Appointment Time:

Name: Name:

Signature: Signature: