

# Client questionnaire

## Phone appointment



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⬇ Please complete and email this questionnaire prior to your appointment via [advice@sunsuper.com.au](mailto:advice@sunsuper.com.au)

### What would you like to talk to a qualified financial adviser about?

Sunsuper Financial Advisers can only provide personal advice about your interest in the Sunsuper Superannuation fund.<sup>1</sup> If you are seeking specific non-Sunsuper or more complex advice, we can arrange a referral with a specialist advice partner (fees may apply).<sup>2</sup>

I would like to talk about:

To assist the level of information and education our advisers provide, can you please indicate your level of finance/investment experience:

<input type="checkbox"/> <b>Limited</b> (Minimal experience with investments/superannuation - looking for greater guidance)	<input type="checkbox"/> <b>Moderate</b> (Some experience with investments/superannuation - seeking some guidance)	<input type="checkbox"/> <b>High</b> (Greater level of experience with investments/superannuation - seeking validation and implementation assistance)
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### 1a Personal details

#### Member number

### 1b Partner details

#### Partner member number if applicable

Member full name	Gender
<input type="text"/>	<input type="button" value="M"/> <input type="button" value="F"/>

Partner full name	Gender
<input type="text"/>	<input type="button" value="M"/> <input type="button" value="F"/>

Member date of birth (DD/MM/YYYY)	Member retirement age
<input type="text"/>	<input type="text"/>

Partner date of birth (DD/MM/YYYY)	Partner retirement age
<input type="text"/>	<input type="text"/>

Occupation	Work status
<input type="text"/>	<input type="text"/>

Occupation	Work status
<input type="text"/>	<input type="text"/>

Age of children or any other dependants

### 2a Income

Member before tax salary/wages (p.a.)

\$

Member other income

\$

### 2b Partner Income (If applicable)

Partner before tax salary/wages (p.a.)

\$

Partner other income

\$

### 3 Living expenses

<input type="checkbox"/> <b>Currently I have surplus cashflow</b> i.e. I have the capacity to save	<input type="checkbox"/> <b>Currently I have minimal surplus cashflow</b> i.e. I spend all that I earn	<input type="checkbox"/> <b>Currently I have negative cashflow</b> i.e. I spend more than I earn
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Living expenses	Frequency
<div style="border: 1px solid #ccc; padding: 2px;">\$ <input style="width: 150px;" type="text"/></div>	<div style="border: 1px solid #ccc; height: 20px;"></div>

➔ Please continue over page

## 4 Target retirement

Please indicate your target retirement income: \$

Suntracker Lifestyle Examples (These figures assume you are a homeowner and are debt free at retirement):

Doing OK \$27,500 p.a. (single), \$40,000 p.a. (couple)

Doing well \$44,500 p.a. (single), \$61,500 p.a. (couple)

Comfortable \$36,500 p.a. (single), \$50,000 p.a. (couple)

Premium \$58,000 p.a. (single), \$77,000 p.a. (couple)

## 5 Assets

Family home

\$

Bank accounts

\$

Term deposits

\$

Direct shares

\$

Managed funds

\$

Investment properties

\$

Personal assets (i.e. boat, contents, etc)

\$

## 6 Superannuation (excluding Sunsuper)

Superannuation fund name

Current value

\$

Owner

\$

\$

## 7a Extra super contributions

Member salary sacrifice (p.a.)

\$

Lump sum contributions (tick before or after tax)

\$

Before tax

After tax

To which super fund?

## 7b Partner extra super contributions

Partner salary sacrifice (p.a.)

\$

Partner lump sum contributions (tick before or after tax)

\$

Before tax

After tax

To which super fund?

## 8 Liabilities List any loans, repayment amounts, interest rates, and expected date that the loans will be paid in full

Home loan

\$

Investment loan

\$

Personal loan

\$

Credit card

\$

Monthly payment

\$

Monthly payment

\$

Monthly payment

\$

Monthly payment

\$

Rate

%

Date paid by (approx)

Rate

%

Date paid by (approx)

Rate

%

Date paid by (approx)

Rate

%

Date paid by (approx)

## 9 Personal insurance (excluding Sunsuper) Complete only if seeking insurance advice

Death cover

\$

Provider/Insurer

Income Protection cover

\$

Provider/Insurer

Total & Permanent Disability cover

\$

Provider/Insurer

Trauma cover

\$

Provider/Insurer

➔ Please continue over page

## 10 Your goals and objectives

Goals	Date/Age	Amount (Annual or Lump Sum)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 11 Other

Is there anything in your wider financial situation that may occur over the next five years that should be considered? If YES provide details below.

 YES NO

Is there anything in your wider family situation that may occur over the next five years that will impact your financial situation? If YES provide details below.

 YES NO

Is there anything else that the adviser should know to provide you appropriate advice? (i.e. inheritances, major health concerns, property sales, aged care considerations for parents) If YES provide details below.

 YES NO

## 12 Acknowledgement

By completing the above, you confirm that:

- To the best of your knowledge; the details provided by you are true, current, and accurate; and you are not aware of any other information relevant to your circumstances.
- You understand that if the information you provided is not full and/or accurate, our advice and recommendations may not be appropriate for your circumstances.
- You have read and understood the Sunsuper Financial Services Pty Ltd (SFS) Financial Services Guide.
- You authorise SFS to use your personal information in accordance with the Sunsuper Privacy Policy and to provide your personal information to third parties for the purpose of assisting us to prepare and provide our advice to you.

We are committed to respecting the privacy of personal information you give us. If you would like a copy of Sunsuper's Privacy Policy, visit [sunsuper.com.au/privacy](https://www.sunsuper.com.au/privacy) or call 13 11 84.

<sup>1</sup> Sunsuper employees provide advice as representatives of Sunsuper Financial Services Pty Ltd (ABN 50 087 154 818 AFSL No. 227867) (SFS), wholly owned by the Sunsuper Superannuation Fund.

<sup>2</sup> Sunsuper has established a panel of accredited external financial advisers who are not employees of Sunsuper. Sunsuper is not responsible for the advice provided by these advisers and does not receive or pay any referral fees. These advisers will explain to you how their advice fees are determined.

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