



Could your finances  
benefit from a check-up?

# Free financial health check



**Would you like your mortgage reviewed to see if we can get you a better rate?**

YES  NO  MAYBE

**Would you like your personal insurances reviewed like life and income protection to make sure you are covered in an unexpected event?**

YES  NO  MAYBE

**Would you like to learn about how you can unlock your mortgage to invest for long term growth?**

YES  NO  MAYBE

**Would you like your super reviewed to make sure you have the best options to achieve your retirement goals?**

YES  NO  MAYBE

We have found that many clients want to improve their financial circumstances however it can be a struggle to sometimes understand where to begin. This brief checklist covers a number of areas which form the basis for building and protecting your future wealth. No matter what your age or financial position, there are opportunities for you to benefit from this exercise.

Once you complete the questionnaire, we will review it with you and discuss any queries you may have or issues that this has raised. We will also discuss the appropriateness of making an introduction to one of our highly qualified financial partners to discuss your particular circumstances in further detail. This does not cost you anything and is obligation free.