

21ST CENTURY FINANCIAL FACT SHEET

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21st Century Accounting Consultation Requests

To enable us to better support you as a 21st Century client, we request you to complete this form and return it to us prior to booking a 21st Century Accounting Consultation. The questions on this form will help us understand your current financial position and what lifestyle goals and objectives are important to you. Even if you do not require a 21st Century Accounting consultation, it is a valuable exercise to complete the Clarity Equals Power component of this form

21ST CENTURY ACADEMY TERMS AND CONDITIONS:

The personal information on this form is being collected by or on behalf of 21st Century Academy Pty Ltd (ABN 82 100 673 818) (21st Century Academy) to register you into and 21st Century Accounting Consultations, 21st Century Finance Consultations and/or 21st Century Financial Services Consultations you have requested from us and to facilitate the conduct of those Consultations and provide you with advice appropriate to your financial circumstances and objectives. If you don't provide us with the information requested in this form, you may not be able to attend the Consultations or we may not be able to provide you with the advice you have requested or advise appropriate for your financial circumstances and objectives. We may also use your personal information to inform you about related products and services offered by 21st Century Academy. Your personal information may be disclosed to our contractor and agents (such as financial advisors, consultation organisers and information technology providers) and may be transferred for these purposes.

We would like to use your personal information to send you information about our other financial, investment, marketing and success information products and services and services (including special offers). We would also like to provide your personal information to our related bodies corporate so that they can send you information about their own financial, investment, marketing and success information products and services (including special offers). If you do not want to do so, please tick the boxes at the end of this privacy statement.

If you would like to access the personal information that 21st Century Academy holds about you, please contact us. We will generally provide you with access to your personal information (although a fee may be imposed).

- I do not wish to receive information from 21st Century Academy about its other financial, investment, marketing and success information products and services (apart from those related to the Consultations)
- I do not wish to receive information about financial, investment, marketing and success information products and services from 21st Century Academy's related bodies.

| Personal Details |

	YOU	PARTNER		
Name	_____			
DOB	_____			
Occupation	_____			
Address	_____			
	CITY/SUBURB	STATE	POSTCODE	
Phone	HOME	WORK	MOBILE	
Email	_____			
Dependents	Y/N	HOW MANY?	AGES	

| Income + Expenditure |

Your annual salary:	\$	Partner's annual salary:	\$
Other income (approx):	\$	Estimated annual expenditure:	\$

| Assets, Liabilities & Wealth Protection |

Principle Residence (estimated value):	\$	Mortgage balance	\$
Personal Loans & other liabilities:			\$
Existing Investments	Property		\$
	Shares		\$
	Managed funds		\$
	Term deposits & cash		\$
	Other:		\$
Superannuation	Provider 1:	Value:	\$
	Investment choice selected:		
	Provider 2:	Value:	\$
	Investment choice selected:		
Wealth protection	Type: Life / TPD / Income Protection / Trauma	Value:	\$
	Type: Life / TPD / Income Protection / Trauma	Value:	\$
	Type: Life / TPD / Income Protection / Trauma	Value:	\$
	Type: Life / TPD / Income Protection / Trauma	Value:	\$
Health Protection	Provider: Cover details:		attached / notated

PLEASE DETAIL ANYTHING ELSE YOU THINK MAY BE RELEVANT:

SL: _____

