



*Diamond Financial
Solutions*



Establishing a Financial Plan

Lifestyle Questionnaire

Client Name

Date

Advisor Name

Date

Please return to Diamond Financial Solutions in the enclosed reply paid envelope:
Diamond Financial Solutions, 119 Willoughby Road, CROWS NEST NSW 2065

Establishing a Financial Plan

Personal Details

Client 1	Client 2
Full Name	Full Name
Date of Birth	Date of Birth
Address	Address
Home Phone	Home Phone
Work Phone	Work Phone
Mobile Phone	Mobile Phone
Email Address	Email Address
Occupation	Occupation
Length of Service	Length of Service
Do you have any health issues? No <input type="checkbox"/> Yes <input type="checkbox"/> →	Do you have any health issues? No <input type="checkbox"/> Yes <input type="checkbox"/> →
Please give details	Please give details
Do you have any Children? No <input type="checkbox"/> Yes <input type="checkbox"/> →	Do you have any Children? No <input type="checkbox"/> Yes <input type="checkbox"/> →
Names/DOB	Names/DOB



By providing us with a guide to your key lifestyle objectives we will be better equipped to help you achieve them. Below are a series of questions to help us assess your short, medium and long term lifestyle plans.

Short Term Objectives (less than 2 years)

Do you have any travel planned, which you would like to set funds aside for? If so, what is the expected outlay?

Are you planning to update any household equipment? If so, what is the expected outlay?

Do you have any funds set aside in case of an emergency? If so, how much?

Other short term issues?



Medium Term Objectives (2 - 5 years)

Do you have any education funding requirements for your children?

Are you planning on buying a house, or upgrading your existing house? Can you estimate the funds which would be required?

Are you planning to upgrade your car? What are the estimated costs involved?

When do you plan to have your mortgage paid off?

Other medium term spending requirements?

Long Term Objectives (5 years +)

If you are not already retired, what is your planned retirement age?

What is your planned retirement income stream? ($\frac{2}{3}$ of your expected final years salary is a general estimate)

Do you have any long term capital expenditure planned eg. boat, holiday house?

Do you plan to assist your children in their financial set up?

Do you expect an inheritance or other one-off lump sum amounts at any time in the future?

You and Financial Planning

Briefly outline why you are seeking financial advice.

What are your expectations of the services that we provide you?

Briefly detail your past experience with Financial Planning.

Briefly detail you past experience with Investments.

Are there any other issues that you would like clarity on?

Are there any specific issues that are particularly important to you?



What are your beliefs about money? Briefly outline your thoughts.

What is most important about money to you?

Do you have any fears about money? If so, what are they?
