

INITIAL FACT FIND



Date

Ref

CLIENT #1	CLIENT #2
Full Name:	Full Name:
Contact phone:	Contact phone:
Email:	Email:
PR: YES NO Citizen: YES NO	PR: YES NO Citizen: YES NO
Date of Birth	Date of Birth
Marital Status:	Marital Status:
Children & Age(s)	Children & Age (s)
Current Address:	Current Address:
Occupation:	Occupation:
Employment: Employed <input type="checkbox"/> Self Employed <input type="checkbox"/>	Employment: Employed <input type="checkbox"/> Self Employed <input type="checkbox"/>
Employer:	Employer:
Income:	Income:
Assets	Assets
KiwiSaver: Have you ever had a KS review? Y / N Do you know what your asset allocation is? Y/N What is the purpose? First home or retirement?	KiwiSaver: Have you ever had a KS review? Y / N Do you know what your asset allocation is? Y/N What is the purpose? First home or retirement?
Own Savings	Own Savings
Property/Other assets	Property/Other assets
Liabilities	Liabilities
Student Loan(balance)	Student Loan(balance)
Home Loan (balance)	Home Loan (balance)
Personal Loan	Personal Loan
Vehicle Loan	Vehicle Loan
Hire Purchase	Hire Purchase
Credit Card(s): Limit Balance	Credit Card(s): Limit Balance
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Insurance	Insurance
Life Trauma TPD Health	Life Trauma TPD Health
Mortgage & Income Employer provided	Mortgage & Income Employer provided
Home Contents Car	
Total number of cars _____	Will POA
Bank	Bank