

Family Appreciation Forms

Andep Investment Consultancy



FAMILY INFORMATION Navigation: tabs move between fields alt+↓ display drop-downs ↓ ↑ within drop downs

Family name

Couple?

Email address

Home telephone

Residential address

Suburb

Post code

State

Postal address

Suburb

Post code

State

Family trust?

Family trust name

Family trust trustee

Self-managed
superannuation fund

Self-managed name

Self-managed trustee

Home owner

Home value

Mortgage

* As identified on "Individual Information" form

INVESTMENTS (more details on investments form)

Total value of investments

Tax losses (+) or credits(-)

Carried forward capital losses

HOW CAN WE HELP YOU?

- Services Superannuation Insurance
 Retirement planning Investments
 Borrowing Estate planning
 Social security advice

Tell us about other services you need and how we can best serve you:

Description

Investment objectives

Investment preferences

Government benefits entitlement

Would you like to pay for your advice fee through your superannuation account?

HOW DID YOU HEAR ABOUT US?

- Method Existing client Accountant Print ad
 Internet Fund manager Newspaper
 other

ACCOUNTANT DETAILS

Name

Firm

Phone

Permission to contact
them?

SOLICITOR DETAILS

Please complete the following forms as necessary

Other forms attached: Individual information Dependents
 Investments & Debts Insurance
 Superannuation

Andep Investment Consultancy

Japhener Pty Ltd ACN 009 169 573 ABN 38 009 169 573

Australian Financial Services License 230 176

Analytical advice since 1982

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INDIVIDUAL INFORMATION

	OLDER PERSON	YOUNGER PERSON
Title	<input type="text"/>	<input type="text"/>
Given names	<input type="text"/>	<input type="text"/>
Preferred name	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Initials	<input type="text"/>	<input type="text"/>
Date of birth DD/MM/YYYY	<input type="text"/>	<input type="text"/>
Gender		
Email address	<input type="text"/>	<input type="text"/>
Mobile telephone	<input type="text"/>	<input type="text"/>
Work telephone	<input type="text"/>	<input type="text"/>
Tax file number	<input type="text"/>	<input type="text"/>
Up to date will?		
Up to date power of attorney?		
Health	<input type="text"/>	<input type="text"/>
Employment status		
Occupation	<input type="text"/>	<input type="text"/>
Employer name	<input type="text"/>	<input type="text"/>

OLDER PERSON

YOUNGER PERSON

Annual salary (gross)

Date joined employer
DD/MM/YYYY

How many weeks of sick
leave do you have?

Other annual income
(exclude pensions)

Nature of other income

Planned retirement date
DD/MM/YYYY

Superannuation Annual Contributions

Employer

Salary sacrifice

Personal

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DEPENDENTS INFORMATION

DEPENDENT 1

Given name

Birth date DD/MM/YYYY

Dependent until DD/MM/YYYY

Gender

Private schooling intentions (if any)

School

Commencement year YYYY

Graduation year YYYY

Will you pay university fees?

Payment of university fees (if applicable) commences YYYY

DEPENDENT 2

Given name

Birth date DD/MM/YYYY

Dependent until DD/MM/YYYY

Gender

Private schooling intentions (if any)

School

Commencement year YYYY

Graduation year YYYY

Will you pay university fees?

Payment of university fees (if applicable) commences YYYY

DEPENDENT 3

Given name

Birth date DD/MM/YYYY

Dependent until DD/MM/YYYY

Gender

Private schooling intentions (if any)

School

Commencement year YYYY

Graduation year YYYY

Will you pay university fees?

Payment of university fees (if applicable) commences YYYY

DEPENDENT 4

Given name

Birth date DD/MM/YYYY

Dependent until DD/MM/YYYY

Gender

Private schooling intentions (if any)

School

Commencement year YYYY

Graduation year YYYY

Will you pay university fees?

Payment of university fees (if applicable) commences YYYY

DEPENDENT 5

Given name

Birth date DD/MM/YYYY

Dependent until DD/MM/YYYY

Gender

Private schooling intentions (if any)

School

Commencement year YYYY

Graduation year YYYY

Will you pay university fees?

Payment of university fees (if applicable) commences YYYY

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INVESTMENTMENTS Do not include the principal home

INVESTMENT 1

Investment name

Investment type

Owner

Units

Purchase date DD/MM/YYYY

Purchase price

Current value

Secured by debt?

Debt number (see "Debts"below)

Annual gross income

INVESTMENT 2

Investment name

Investment type

Owner

Units

Purchase date DD/MM/YYYY

Purchase price

Current value

Secured by debt?

Debt number (see "Debts"below)

Annual gross income

INVESTMENT 3

Investment name

Investment type

Owner

Units

Purchase date DD/MM/YYYY

Purchase price

Current value

Secured by debt?

Debt number (see "Debts"below)

Annual gross income

INVESTMENT 4

Investment name	<input type="text"/>		
Investment type	<input type="text"/>	Owner	<input type="text"/>
Units	<input type="text"/>	Purchase date DD/MM/YYYY	<input type="text"/>
Purchase price	<input type="text"/>	Current value	<input type="text"/>
Secured by debt?	Debt number (see "Debts"below)		
Annual gross income	<input type="text"/>		

INVESTMENT 5

Investment name	<input type="text"/>		
Investment type	<input type="text"/>	Owner	<input type="text"/>
Units	<input type="text"/>	Purchase date DD/MM/YYYY	<input type="text"/>
Purchase price	<input type="text"/>	Current value	<input type="text"/>
Secured by debt?	Debt number (see "Debts"below)		
Annual gross income	<input type="text"/>		

INVESTMENT 6

Investment name	<input type="text"/>		
Investment type	<input type="text"/>	Owner	<input type="text"/>
Units	<input type="text"/>	Purchase date DD/MM/YYYY	<input type="text"/>
Purchase price	<input type="text"/>	Current value	<input type="text"/>
Secured by debt?	Debt number (see "Debts"below)		
Annual gross income	<input type="text"/>		

INVESTMENT 7

Investment name	<input type="text"/>		
Investment type	<input type="text"/>	Owner	<input type="text"/>
Units	<input type="text"/>	Purchase date DD/MM/YYYY	<input type="text"/>
Purchase price	<input type="text"/>	Current value	<input type="text"/>

Secured by debt?

Debt number (see "Debts"below)

Annual gross income

DEBTS

DEBT 1

Debt Type

Debt amount

Lender

Owner

Loan maturity date DD/MM/YY

Repayments

Interest rate

Min repayment (\$/month)

Nature Personal

Investment

Interest rate type

Percentage of loan at fixed rate

Review date of interest rate type DD/MM/YY

Does the debt have an offset facility?

What is the current balance of your offset account?

Remarks

DEBT 2

Debt Type

Debt amount

Lender

Owner

Loan maturity date DD/MM/YY

Repayments

Interest rate

Min repayment (\$/month)

Nature Personal

Investment

Interest rate type

Percentage of loan at fixed rate

Review date of interest rate type DD/MM/YY

Does the debt have an offset facility?

What is the current balance of your offset account?

Remarks

DEBT 3

Debt Type	<input type="text"/>	Debt amount	<input type="text"/>
Lender	<input type="text"/>		
Owner	<input type="text"/>	Loan maturity date DD/MM/YY	<input type="text"/>
Repayments	<input type="text"/>	Interest rate	<input type="text"/>
Min repayment (\$/ month)	<input type="text"/>	Nature	<input type="radio"/> Personal <input type="radio"/> Investment
Interest rate type	<input type="text"/>	Review date of interest rate type DD/MM/YY	<input type="text"/>
Percentage of loan at fixed rate	<input type="text"/>	Does the debt have an offset facility?	What is the current balance of your offset account? <input type="text"/>
Remarks	<input type="text"/>		

DEBT 4

Debt Type	<input type="text"/>	Debt amount	<input type="text"/>
Lender	<input type="text"/>		
Owner	<input type="text"/>	Loan maturity date DD/MM/YY	<input type="text"/>
Repayments	<input type="text"/>	Interest rate	<input type="text"/>
Min repayment (\$/ month)	<input type="text"/>	Nature	<input type="radio"/> Personal <input type="radio"/> Investment
Interest rate type	<input type="text"/>	Review date of interest rate type DD/MM/YY	<input type="text"/>
Percentage of loan at fixed rate	<input type="text"/>	Does the debt have an offset facility?	What is the current balance of your offset account? <input type="text"/>
Remarks	<input type="text"/>		

DEBT 5

Debt Type	<input type="text"/>	Debt amount	<input type="text"/>
-----------	----------------------	-------------	----------------------

Lender

Owner Loan maturity date DD/MM/YY

Repayments Interest rate

Min repayment (\$/month)

Nature Personal
 Investment

Interest rate type

Percentage of loan at fixed rate

Review date of interest rate type DD/MM/YY

Does the debt have an offset facility?

What is the current balance of your offset account?

Remarks

DEBT 6

Debt Type Debt amount

Lender

Owner Loan maturity date DD/MM/YY

Repayments Interest rate

Min repayment (\$/month)

Nature Personal
 Investment

Interest rate type

Percentage of loan at fixed rate

Review date of interest rate type DD/MM/YY

Does the debt have an offset facility?

What is the current balance of your offset account?

Remarks

DEBT 7

Debt Type Debt amount

Lender

Owner Loan maturity date DD/MM/YY

Repayments		Interest rate	<input type="text"/>
Min repayment (\$/ month)	<input type="text"/>	Nature	<input type="radio"/> Personal <input type="radio"/> Investment
Interest rate type			
Percentage of loan at fixed rate	<input type="text"/>	Review date of interest rate type DD/MM/YY	<input type="text"/>
Does the debt have an offset facility?		What is the current balance of your offset account?	<input type="text"/>
Remarks	<input type="text"/>		

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SUPERANNUATION

ACCOUNT 1

Fund name	<input type="text"/>		
Person	Fund type		
Investment option	<input type="text"/>		
Accumulation/account based pension balance	<input type="text"/>	<input type="checkbox"/> Account based pension <input type="checkbox"/> Accumulation	
Lump sum multiple of final average salary at planned retirement	<input type="text"/>	Pension percentage of final average salary at planned retirement	<input type="text"/>
Defined benefit annual accrual	<input type="text"/>		
Defined benefit pension currently paid Sp.a.	<input type="text"/>	Spouse reversion percentage	<input type="text"/>
Ceases on		DD/MM/YYYY	<input type="text"/>
Pension indexation (current & future)		Fixed percentage	<input type="text"/>

ACCOUNT 2

Fund name	<input type="text"/>		
Person	Fund type		
Investment option	<input type="text"/>		
Accumulation/account based pension balance	<input type="text"/>	<input type="checkbox"/> Account based pension <input type="checkbox"/> Accumulation	
Lump sum multiple of final average salary at planned retirement	<input type="text"/>	Pension percentage of final average salary at planned retirement	<input type="text"/>
Defined benefit annual accrual	<input type="text"/>		

Defined benefit pension currently paid Sp.a.

Spouse reversion percentage

Ceases on DD/MM/YYYY

Pension indexation (current & future) Fixed percentage

ACCOUNT 3

Fund name

Person Fund type

Investment option

Accumulation/account based pension balance

- Account based pension
- Accumulation

Lump sum multiple of final average salary at planned retirement

Pension percentage of final average salary at planned retirement

Defined benefit annual accrual

Defined benefit pension currently paid Sp.a.

Spouse reversion percentage

Ceases on DD/MM/YYYY

Pension indexation (current & future) Fixed percentage

ACCOUNT 4

Fund name

Person Fund type

Investment option

Accumulation/account based pension balance

- Account based pension
- Accumulation

Lump sum multiple of final average salary at planned retirement

Pension percentage of final average salary at planned retirement

Defined benefit annual accrual

Defined benefit pension currently paid Sp.a.

Spouse reversion percentage

Ceases on DD/MM/YYYY

Pension indexation (current & future) Fixed percentage

ACCOUNT 5

Fund name

Person Fund type

Investment option

Accumulation/account based pension balance

- Account based pension
- Accumulation

Lump sum multiple of final average salary at planned retirement

Pension percentage of final average salary at planned retirement

Defined benefit annual accrual

Defined benefit pension currently paid Sp.a.

Spouse reversion percentage

Ceases on DD/MM/YYYY

Pension indexation (current & future) Fixed percentage

ACCOUNT 6

Fund name

Person Fund type

Investment option

Accumulation/account based pension balance

- Account based pension
- Accumulation

Lump sum multiple of final average salary at planned retirement

Pension percentage of final average salary at planned retirement

Defined benefit annual accrual

Defined benefit pension currently paid \$p.a.

Spouse reversion percentage

Ceases on DD/MM/YYYY

Pension indexation (current & future) Fixed percentage

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INSURANCE

INSURANCE 1

Insurance type	<input type="text"/>	Sum insured	<input type="text"/>
Insurer	<input type="text"/>		
Insurer type	<input type="text"/>		
Person insured (if applicable)	<input type="text"/>		
Beneficiary (policy owner)	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 2

Insurance type	<input type="text"/>	Sum insured	<input type="text"/>
Insurer	<input type="text"/>		
Person insured (if applicable)	<input type="text"/>		
Beneficiary (policy owner)	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 3

Insurance type		Sum insured	<input type="text"/>
	<input type="text"/>		
Insurer	<input type="text"/>		
Person insured (if applicable)			
	<input type="text"/>		
Beneficiary (policy owner)			
	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 4

Insurance type		Sum insured	<input type="text"/>
	<input type="text"/>		
Insurer	<input type="text"/>		
Person insured (if applicable)			
	<input type="text"/>		
Beneficiary (policy owner)			
	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 5

Insurance type		Sum insured	<input type="text"/>
	<input type="text"/>		
Insurer	<input type="text"/>		
Person insured (if applicable)			
	<input type="text"/>		
Beneficiary (policy owner)			
	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 6

Insurance type	<input type="text"/>	Sum insured	<input type="text"/>
Insurer	<input type="text"/>		
Person insured (if applicable)	<input type="text"/>		
Beneficiary (policy owner)	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

INSURANCE 7

Insurance type	<input type="text"/>	Sum insured	<input type="text"/>
Insurer	<input type="text"/>		
Person insured (if applicable)	<input type="text"/>		
Beneficiary (policy owner)	<input type="text"/>		
Annual premium	<input type="text"/>	Waiting period (months)	<input type="text"/>
Remarks	<input type="text"/>		

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