Business, property and tax accountants

www.chan-naylor.com.au

Client Information Form
Structure Review

WEBSITE

Chan & Naylor Australia – Head Office
Suite 4, 53 Grandview St
PYMBLE NSW 2073
(02 9391 5400
7 02 9988 0324

Congratulations on taking this proactive step ...

To ensure your Structure Review is both efficient and effective, please follow these simple steps:

1. Enter your name here ______________________________

2. Fill out the Order Form.

3. Attach any relevant documents or extra notes.

4. Please indicate the most preferable time and location for your Structure Review

   Day______________________(between Mon-Fri) Time______________(between 9am -3pm)

   NSW: q Eastern Suburbs q Parramatta

   q Pymble

   ACT: q Canberra

   VIC: q Melbourne

   WA: q Perth

   QLD: q Brisbane q Gold Coast

   OTHER: q By Phone

5. Send all completed forms by:

   * Mail to Chan & Naylor Australia, PO Box 6063 PYMBLE NSW 2073

   7 Fax to 02 9988 0324

6. We will be in touch with you shortly to schedule your appointment ...

Kind Regards

The Chan & Naylor Team

Services	Qty	$

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Structure Review	$395.00		
Advanced Structure Review (with Chan & Naylor Platinum Services) with	$550.00		
Express Structure Review – to have the Structure Review within 5 days	$550.00		
Prices Include GST	Total (Inc GST)		

Our books and DVD's can be purchased from our website www.chan-naylor.com.au

Payment Details (PLEASE NOTE: UNLESS YOU ARE OPTING FOR THE EXPRESS SERVICE,PAYMENTS ARE TAKEN APPROX 5 WORKING DAYS BEFORE APPOINTMENT)
(2% Creditcard Surcharge, 3%Amex Surcharge)

Credit Card	☐ MasterCard ☐ VISA ☐ AMEX	Expiry	Name on Card
Card Number			
Amount $		Signature	?

Cheque — Post to Chan & Naylor Pty Ltd PO Box 6063, Pymble NSW 2073
(Chq's will be banked 7 working days before appointment)

Direct Deposit — BSB: 082 330
Account Number: 5942 32916
Account Name: Chan & Naylor Australia
Reference: YOUR FULL NAME

What issues do you hope can be resolved from your consultation? What information or knowledge do you hope to gain from your consultation?

Not a Financial Plan

Information provided by us to you during your consultation or structure review is of a general nature and not intended to be nor purported to be financial advice. Chan & Naylor Australia Pty Ltd and its related companies or any of their directors, officers, employees or contractors are NOT licensed financial planners. Any discussion during a Structure Review or other consultation about superannuation, shares, managed funds, investments, or similar topics are only made in the context of accounting and taxation and should not be taken to be general or personal financial advice to you. You must not act on any matter discussed without taking professional advise from a licensed financial planner who will take due regard to your specific and particular needs.

Agency Agreement

You appoint Chan and Naylor Pty Ltd or its related companies or any of their directors, officers, employees or contractors ("Chan and Naylor") as your agent to undertake communication or correspondence with any required legal advisor to provide you with legal advice. Chan and Naylor will maintain the confidentiality of any communications or correspondence so created within the law and use such information in furtherance of your requirements.

Disclaimer

The client acknowledges that Chan & Naylor Australia Pty Ltd (or its directors, officers or representatives) is not an Australian Financial Services licensee authorized to provide financial product advice or deal in financial products. However at your request Chan & Naylor may refer you to an Australian Financial Services Licensee or their authorised representatives who are authorized to provide financial advice. Chan & Naylor Financial Planning Pty Ltd is a corporate Authorised Representative (No. 331168) of PATRON Financial Advice, AFSL No.307379.

Privacy Agreement

It is our policy not to sell or pass on any personal information that you may have provided to us unless we have your express consent to do so. From time to time, we may receive requests to furnish your financial details to third parties. In order to comply with privacy laws please acknowledge that we are able accept your verbal authority as legal confirmation in these circumstances. An exception to this is where Chan & Naylor may be required by law to disclose certain information.

CLIENT ACKNOWLEDGEMENT OF ABOVE DISCLAIMERS, WARNINGS AND SIGNATURE:

1. Client Signature	2. Client Signature	Date
?	?	

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Client Details

	Title	First Name	Surname	D.O.B	Age	Sex (M/F)	Relationship
1							*To Client 2*
2							*To Client 1*

Address	Suburb	State	Post Code
Home			
Postal			

Email

1	*If you do not want to receive our FREE Monthly Newsletter, please tick here.* ☐
2	*If you do not want to receive our FREE Monthly Newsletter, please tick here.* ☐

	Phone	Work	Mobile	Fax	Other
1					
2					

	Child's Name	Age	Sex	Living at home Y/N	Salary	Comments
1						
2						
3						
4						

Are you a current client of Chan & Naylor? Y / N   If YES, who is your current client Manager?

If NO, you should consider registering for a Financial Health Check?

How did you hear about Chan & Naylor? (If referred, please tell us how) PLEASE BE SPECIFIC

tick box à ¨ Book ¨ Seminar ¨ Website ¨ Friend/Family
If Friend /Family, have they had a Financial Health Check? Y / N   Who they saw:
OTHER:

Client Information Form

Income & Structure Details

Tell us about your business

	Business Name	Description	Structure (Indicate if Company, Sole Trader, Partnership or Trust)	Ownership Details	Turnover $000	Business Assets	Value of Business Assets $000	Number of Employees	Date Started
1									
2									
3									
4									

What are your sources of income?

	Client Name	Job Description	Dated Started	Salary $000	Bonuses $000	Super Value $000	Additional Super Contributions	Value of Life Insurance $000	Comments
1									
2									
3									
4									
5									
6									

Client Information Form

Income & Structure Details

Tell us about your existing structures (personal, business and investments) – please use a separate sheet of paper if insufficient space on this form?

	Business and Personal Assets and Investments	Type of Holding Structure (indicate if Company, Sole Trader, Partnership, Trust or other)	Name or Description of holding structure, including trustee if applicable	Are your Holding Structures linked to each other? (attach hand drawn picture if necessary)	Asset / Investment Value $000	Business Activity	Are other third parties involved in the structures? (If YES, provide details)	Date Started
1								
2								
3								
4								
5								

Tell us about any other arrangements, legal structures, etc you may have:

Tell us about your existing structures (personal, business and investments) – please use a separate sheet of paper if insufficient space on this form?

Client Information Form

Property Investment Details

Do you have any property?

Property Details (include your Principal Place of Residence)

	Suburb	State	Ownership Details	Property Type	Date of Purchase	Purchase Price $000	Current Market Value $000	Debt $000	Loan Type	Equity $000	Weekly Rental Income	Depreciation Claimed?	Have you lived in this property?
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													

What are your future property investment plans?

Comments

Client Information Form

Share Investment Details

Do you own any Shares or Managed Funds?

Share/Managed Funds Details

	Name	Ownership Details	Date of Purchase	Total Value of Purchase $000	Current Market Value $000	Debt $000	Loan Type	Equity $000		Holding or selling?
1										
2										
3										
4										
5										
6										
7										
8										

What are your future shares or managed funds investment plans?

Would you like a free analysis of your future shares and managed funds plans by an Australian Financial Services Licensee or their authorised representatives? à	q Yes	q Not Yet	q Never

Comments

Self Managed Superannuation Fund (SMSF)

Do you have a SMSF ?	q Yes	q No	q Not Interested
If NO would you like a free analysis by an Australian Financial Services Licensee or their authorised representatives? à	q Yes	q Not	q Later

Insurances – Do you have:				
Life Insurance?	q No à go to next question	q Yes à	Approximate Insured Value	$
Income Protection?	q No à go to next question	q Yes à	Approximate Insured Value	$
Trauma Insurance?	q No à go to next question	q Yes à	Approximate Insured Value	$
Would you like a free analysis of your various insurances by an Australian Financial Services Licensee or their authorised representatives? à				q Yes q Not Yet q Never
Comments				

Estate Planning – Do you have estate planning arrangements in place?	q Yes	q Not Yet q No à go to next question
Do You Have a current will in place?	q Yes	q Not Yet
Do You have an Enduring Power of Attorney or other Power of Attorney in place?	q Yes	q Not Yet
Do You have succession Planning Arrangements in place	q Yes	q Not Yet

COMMENTS

Do You want Chan & Naylor to contact you annually for a structure or tax review?	q Yes	q No
COMMENTS		