

Review Checklist and Questionnaire

Aspire Wealth Management aims to provide the highest level of service to Clients with Investment, Savings, Retirement, Mortgage, Insurance and General Financial Planning matters. To allow us to provide this service to Clients, your Programme needs to be regularly reviewed and our records updated. We would ask you to please complete this form and return it to our office so we can ensure your Programme continues to fulfil your goals and objectives.

Personal Details

Name:	Date of Birth:
Spouse\$/Partner\$ Name:	Spouse\$/Partner\$ Date of Birth
Children\$ Names:	Children\$ Date/s of Birth:
Home Address:	Home Phone:
Work Address:	Business Phone:
	Home/Business Fax No:
	Email Address:

Since our last discussion, I -

- | | |
|-------------------------------|---|
| Married | Divorced, Separated |
| Had a child | Purchased a new home |
| Made a Will | Intend purchasing a new home |
| Changed my Will | Set up a Trust |
| Need to change my Beneficiary | Started a New Business |
| Incorporated my business | Entered into a Partnership |
| Retired or am retiring soon | Intend increasing my Retirement Funding |
| Purchased Investment Property | Purchased a holiday home |
| Intend purchasing property | |

Personal Needs: The following items are a priority for me

- | | |
|--|---|
| Purchasing Salary Replacement | Retirement strategies |
| Property related Investments | Planning my exit from business |
| Serious Illness Insurance | Life Assurance |
| Arranging a new mortgage | Insurance for spouse/children |
| Inheritance Tax review | Gifting funds to my family |
| Deposit Investments | Self Administered Pension Funds |
| Stock Market related Investments | Borrowing on Pension Funds |
| Determining if and when I will be financially independent | College accumulation funds for children/grandchildren |
| Audit existing liabilities and cost savings in refinancing | |

Business Needs: I would like to receive information or assistance on -

- Salary Sacrifice Planning for Retirement
- Business Loans
- Life Assurance
- Estate tax analysis
- Income Replacement if sick or injured
- Disability Income Insurance for employees
- Personal Retirement Fund investments
- A Pension Plan for the self-employed
- Key Person Life Insurance
- Directors/Partnership Buy Out Planning
- Business exit strategies
- PRSA's for staff
- Better ways to buy Group Term Life
- How my business can pay for my insurance

Important Questions

1. My current salary is " 0 0 0 . and I expect to draw down a bonus of " 0 0 0 .. this year
2. I would like to retire at age 0 0 0 0 0 0 0 .
3. On retirement, I will need 0 0 0 0 0 % of my current salary to live on.
4. My current Retirement Programme will provide this amount :
Yes
No
5. If I could save as much in the next five years as I saved in the last five years, I would have enough to live on for the rest of my life?
Yes
No
6. I would like to examine ways to increase my retirement savings and/or growing my retirement fund.
Yes
No
7. If I was unable to work, I will have sufficient income to sustain my current lifestyle and dreams?
Yes
No
8. If I suffered a major illness I have enough funds to change my lifestyle or sustain my current income?
Yes
No
9. If my spouse suffers a major sickness I will be able to take the time off work to look after him/her?
Yes
No
10. In the event of my death, my Life Insurance is sufficient to allow my spouse and children to continue living in our current home, debt free and with an ongoing income to maintain the same standard of living that we currently have.
Yes
No
11. Eamon, please contact the following person who I believe would benefit from your services -

Name: 0 0 0 0 0 0 0 0 0 0 0 0 0 0 . Phone No.: 0 0 0 0 0 0 0 0 0 0 0 0