

Goal Assessment Individual Client

Name: Ref:

Accountant: Office: Date:

1. What are your three most important personal and financial goals?

Please include a timeframe and approx. costing

2. Have you discussed these goals with your partner?

Yes No NA

Please provide details

3. What financial concerns do you have? Is there anything keeping you awake at night?

4. What is your plan for the next 6, 12 and 24 months with regards to:

Making your financial goals a reality

Cash flow / Debt reduction

Wealth creation

Protecting you & your family

Remove financial concerns and sleep well at night

Tax minimisation

Superannuation

Estate planning

Please provide details

5. How would you feel if I told you we can help put a plan in place to achieve those goals? I'll have an RJS Professional contact you to get the ball rolling.

That would be amazing

I'm not ready for that

Please provide details

Because together... We take clients far!
#togetherisbetter

SERVICES TO CONSIDER:

RJS Loan Solutions – for home, business and personal loan advice.

RJS Wealth Management – for super, insurance, debt management, retirement, investment advice and more.

RJS Legal Group – Wills & estate planning, family law, employment law, conveyancing.

RJS Accounting & Taxation – business & personal tax advice, corporate structuring, SMSF's and more.