

Financial Success Gap Analysis

collinshume.com.au

Collins
Hume

ACCOUNTANTS
BUSINESS ADVISERS
FINANCIAL ADVISERS
MORTGAGE BROKERS

At Collins Hume, we take pride in providing the best service and advice in managing your tax and accounting. We know that this is only one component of your overall financial success.

To assist us, please take 60 seconds to complete this Gap Analysis. If there are any gaps in your financial world that are a priority to fix, we will discuss them with you and, if you wish, we can refer you to our preferred professional advisers in each area.

Please read each question and complete with your response:

Name(s)

Rate Yourself		
1. How would you rate your overall financial organisation right now?	<input type="checkbox"/>	<input type="checkbox"/>
	Completely disorganised	Totally organised
2. How confident are you that you are on track to build the assets you will need for a long, comfortable stress free retirement?	<input type="checkbox"/>	<input type="checkbox"/>
	Not confident at all	Totally confident
3. How confident are you that your family would have enough income and assets in the event of your death or disability?	<input type="checkbox"/>	<input type="checkbox"/>
	Not confident at all	Totally confident
4. How confident are you that you know exactly what would happen to your assets, liabilities and super in the event of your death?	<input type="checkbox"/>	<input type="checkbox"/>
	Not confident at all	Totally confident
5. How confident are you that your loans are properly structured, tax effectively, with a clear plan to reduce bad debt?	<input type="checkbox"/>	<input type="checkbox"/>
	Not confident at all	Totally confident

I/We hereby authorise Collins Hume to share my/our information with other professional advisers as necessary to assist in my/our financial matters:

Name: _____ Signature: _____ Date: _____

Name: _____ Signature: _____ Date: _____

As a valued client of Collins Hume you are entitled to an obligation free meeting with our financial planning and lending partners.

Collins Hume values the privacy of every individual's personal information and is committed to protecting the personal information you provide. The collection, maintenance, use and disclosure of personal information by Collins Hume is managed in accordance with the Australian Privacy Principles (APPs) in the Privacy Act. The Privacy Amendment (Enhancing Privacy Protection) Act 2012 (Privacy Amendment Act) made many significant changes to the Privacy Act 1988 (Privacy Act). These changes commenced on 12 March 2014. The Privacy Regulation 2013, made under the Privacy Act, also commenced on 12 March 2014.

The personal information you provide to us for purpose of this "Gap Analysis" will be used to assist Collins Hume and/or its agents to facilitate actions to address needs explicitly or implicitly outlined in the above. Subject to use for the purposes detailed in the above paragraph, this paragraph and except if required or allowed by law, all personal information you provide us will remain strictly confidential and will be held at Collins Hume. Under no circumstances will your personal information be sold or made available to marketing agencies or similar parties not involved with Collins Hume without your express prior consent.

Ballina
97 Tamar Street
PO Box 731
Ballina NSW 2478

Byron Bay
Shop 7B
6 Lawson Street
Byron Bay NSW 2481

Lismore
Suite 3A
186 Molesworth Street
Lismore NSW 2480

P (02) 6686 3000
F (02) 6686 7854
E mail@collinshume.com.au
ABN 35 670 434 379



Collins Hume is a Corporate Authorised Representative No 1243440 of GPS Wealth Ltd | AFSL 254 544 | Australian Credit Licence 254544 | ABN 17 005 482 726