

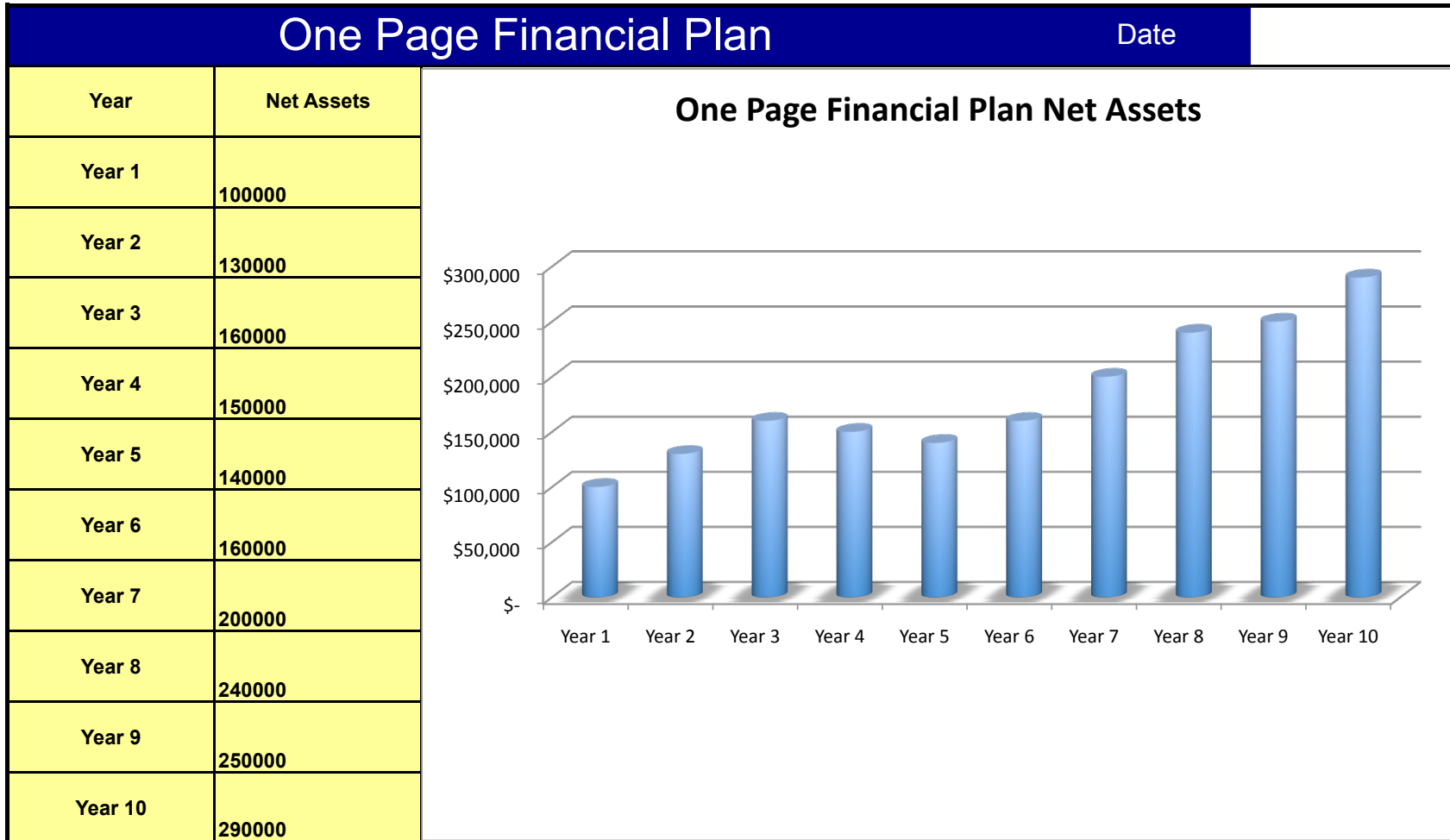
Completed Sample

One-Page Financial Plan					Date	
1. Team	2. Current situation	3. Goals and Objectives	4. Strategies	5. Tactics	6. Implementation	7. Review of plan
Who is going to help you?	Where are you at now?	What do you want to achieve?	What do you need to do?	What needs to be done to implement the strategy?	What needs to be done and who needs to be contacted?	By whom, by when, completed?
<b>Financial Adviser</b> Sam Henderson Henderson Maxwell (02) 9222 1422	<b>Assets</b> \$400,000	<b>Goal 1-</b> To understand where my income goes and set a budget	Do a budget for the past 12 months	Download budget planner from Henderson Maxwell website, complete it to understand cash flow	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Review date _____
<b>Accountant</b> James Squire Squire Fitzgerald (02) 9222 1411	<b>Liabilities</b> \$230,000	<b>Goal 2-</b> To build a share portfolio worth \$100,000 within 7 years	Invest \$800 per month into a regular share trading account investing every three months	Open an account with etrade and set up a direct debit of \$800 per month from my bank account	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
<b>Solicitor</b> Ken Citizen Citizen Legal Contact (02) 9234 5678	<b>Net Assets</b> \$170,000	<b>Goal 3-</b> To own two investment properties within 5 years	Save for a deposit to buy an investment property	Organise a \$800pm direct debit to internet savings account from my monthly pay to save for deposit	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
<b>SMSF Administrator</b> None	<b>Income Before Tax</b> \$80,000	<b>Goal 4-</b> To obtain personal insurances within 3 months	Obtain quotes for insurances and undertake health tests	Obtain quotes from ING, MLC and Zurich for Life, TPD, Income Protection and Trauma insurance	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
<b>Stockbroker</b> Etrade Australia Contact 1300 987 654	<b>Income After Tax</b> \$63,539	<b>Goal 5-</b> To have a Will and Powers of attorney within 3 months	Have a Will and Powers of Attorney drawn up	Book an appointment with Ken Citizen to obtain Wills and P/A	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
<b>Real Estate Agent</b> None	<b>Superannuation Balance</b> \$67,987	<b>Goal 6-</b> To own my house outright with 15 years	Repay principle and interest on house and set loan over 15 years	Call bank to refinance house and obtain a line of credit facility to use for future investment purposes	By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
	<b>Structures</b> Assets in personal name. No family trust, company or self managed super fund	<b>Goal 7-</b>			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
	<b>Insurances-</b> None <b>Estate Planning-</b> No will or Power of Attorney	<b>Goal 8-</b>			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____

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One-Page Financial Plan					Date	
1. Team	2. Current situation	3. Goals and Objectives	4. Strategies	5. Tactics	6. Implementation	7. Review of plan
Who is going to help you?	Where are you at now?	What do you want to achieve?	What do you need to do?	What needs to be done to implement the strategy?	Who's involved, contacts, forms done and completed?	By whom, by when, completed?
Financial Adviser	Assets	Goal 1-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Review date _____
Accountant	Liabilities	Goal 2-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
Solicitor	Net Assets	Goal 3-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
SMSF Administrator	Income Before Tax	Goal 4-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
Stockbroker	Income After Tax	Goal 5-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
Real Estate Agent	Superannuation Balance	Goal 6-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
	Structures	Goal 7-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____
	Insurances- Estate Planning-	Goal 8-			By whom _____ Contact _____ Forms done Yes No Completed? Yes No	By whom _____ By when _____ Completed? Yes No Review date _____

Back page sample



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