

**Section 1 - Personal, residential and employment**

<b>Client / Director 1</b>										
<b>Personal</b>										
Title:					First name:					
Middle name(s):					Last name:					
Marital status:					Email:					
Phone:	M				H				W	
Tax File Number (TFN):										
Date of birth:				Licence number:			Licence expiry:			
<b>Dependants</b>										
Full name:						Date of birth:				
Full name:						Date of birth:				
Full name:						Date of birth:				
Room for additional dependants at client 2										

<b>Residential</b>									
Residential address (current):									
Residential status (current):						Date moved into current address:			
Postal address (current):	Same as residential								
If other, please detail:									
<b>Please list previous addresses (3 years history)</b>									
Not applicable									
Number:				Street:					
Suburb:				State:			Postcode:		
Date moved in:						Date moved out:			
Previous residential status:									
Number:				Street:					
Suburb:				State:			Postcode:		
Date moved in:						Date moved out:			
Previous residential status:									

Employment			
Current employment status:			
Employer Company name:			
Employer phone number:			
Employer address:			
Job title:		Commencement date:	
Previous employment (3 years history) OR second job			Not applicable
Employer Company name:			
Employer phone number:			
Employer address:			
Job title:		Commencement date:	
Annual income:		End date:	

Client / Director 2			
Personal			
Title:		First name:	
Middle name(s):		Last name:	
Marital status:		Email:	
Phone:	M	H	W
Tax File Number (TFN):			
Date of birth:		Licence number:	
		Licence expiry:	
Dependants			Same as client 1
Full name:		Date of birth:	
Full name:		Date of birth:	
Full name:		Date of birth:	

Residential			
Residential address (current):			
Residential status (current):		Date moved into current address:	
Postal address (current):	Same as residential		
If other, please detail:			

Please list previous addresses (3 years history)				Not applicable	
Number:		Street:			
Suburb:		State:		Postcode:	
Date moved in:				Date moved out:	
Previous residential status:					
Number:		Street:			
Suburb:		State:		Postcode:	
Date moved in:				Date moved out:	
Previous residential status:					

Employment			
Current employment status:			
Employer Company name:			
Employer phone number:			
Employer address:			
Job title:		Commencement date:	
Previous employment (3 years history) OR second job			Not applicable
Employer Company name:			
Employer phone number:			
Employer address:			
Job title:		Commencement date:	
Annual income:		End date:	

**Comments**

Tell us about anything else important to you or your situation


**Section 2 - Entities**

Tell us about all the entities you have

Entity type:	Entity name:	ABN / ACN:	TFN:	Relates to:	Relationship:

### Section 3 - Income

Tell us about all the money you receive

Income type:	Amount:	Frequency:	Relates to:	Comments:
Employment income:			Client 1	
Employment income:			Client 2	

### Section 4 - Expenses

Tell us about all the money you spend

Expense type:	Amount:	Frequency:	Relates to:	Comments:

## Section 5 - Assets

Tell us about all the things you own

Asset type:	Asset value:	Relates to:	Comments:

## Section 6 - Liabilities

Tell us about all the things you owe

Liability type:	Lender:	Balance:	Limit:	Repayment amount:	Repayment frequency:	Relates to:	Paying out:

## Section 6 - Your Goals & Objectives

(This information will assist in determining the most appropriate product and strategies for you)

### Lifestyle (Travel, Child Education, etc)

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### Debt Management (Paying off debt)

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### Cashflow (Budgeting)

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### Savings/Investments (Cash & Shares, Managed Funds)

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### Protection (Life, TPD, Income Protection & Trauma Insurance)

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### Superannuation (Fees, Investment options, growth)

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### Retirement (Desired age & Income)

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### Estate Planning (Wills)

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# Moneysmith Group Privacy Disclosure Statement and Consent

We are collecting personal and financial information about you to provide you with our **Mortgage Broking and/or Financial Planning services**.

1. The information you provide will be held by Moneysmith Group Pty Ltd, Skyebly Pty Ltd ACN 108 370 341 ATF Skyebly Trust trading as Moneysmith Australia, PCFC Group Pty Ltd ACN 615 084 243 ATF PCFC Group Trust Moneysmith Financial, Vow Financial Pty Limited ACN 138 789 161 (Australian Credit Licence 390261) and Futuro Financial Services Pty Ltd ABN 30 085 870 015 (Australian Credit Licence 238478)
2. You appoint us your agent to obtain your credit information from a credit reporting body on your behalf.
3. You appoint us, our employees, and our agents permission to contact your employers, accountant, superannuation provider or anyone else as required for the purpose of verifying details supplied by you.
4. We may use credit information and any other information you provide to arrange or provide finance and other services.
5. We may exchange the information with the following types of entities, some of which are located overseas:
  - Persons who provide finance or other products to you, or to whom an application has been made for those products.
  - Financial consultants, accountants, lawyers and advisers
  - Any industry body, tribunal, court or otherwise in connection with any complaint regarding our services
  - Any person where we are required by law to do so
  - Any of our associates, related entities, contractors and outsourcing partners some of which are located in the Philippines
  - Your referees, such as your employer, to verify information you have provided
  - Any person considering acquiring an interest in our business or assets
  - Any organisation providing online verification of your identity.
6. You confirm that you are authorised to provide the personal details presented and consent to your information being checked with the document issuer or official record holder via third party systems for the purpose of confirming your identity.
7. You may gain access to the personal information that we hold about you by contacting us. A copy of our privacy policy can be obtained at [www.finsure.com.au](http://www.finsure.com.au) or by contacting us on 1300 769 415. Our privacy policy contains information about how you may access or seek correction of the information we hold about you, how we manage that information and our complaints process.

If you do not provide the information we may be unable to assist in arranging finance or providing other services.

## APPLICANT(S) EXECUTION

### Declaration and Acknowledgement

- You confirm that all information in this document has been recorded correctly.
- You can confirm that you have been provided with a Credit Guide.
- You agree that we may collect and use your personal information as specified in the Disclosure Statement above.
- You acknowledge that you have been informed about your risk insurance options.

Client / Director 1

Client / Director 2

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Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date