

HOLDEN & BOLSTER FINANCIAL SOLUTIONS PTY LTD

Email answers to: michelle@holbol.com.au

DIAGNOSTIC QUESTIONNAIRE

Question	I don't Know	I'm not really sure	I'm reasonably confident	I'm absolutely certain
1 Considering how much tax you are paying now, how certain are <u>you</u> that you are maximising your legal entitlements to pay as little tax as permissible?				
2. If through some form of illness or injury, you were unable to work for a short period of time, are you quite sure that your current lifestyle could be maintained?				
3. If you or your partner died prematurely, are you certain that your family would be fully provided for financially?				
4. If forced to retire early, due to injury or sickness, are you sure that any insurance lump sum received would be sufficient to support you and your family into the future?				
5. How definite are you that your superannuation/other investments will fund the lifestyle you expect in retirement?				
6. If you have investments, are you quite confident that they will achieve your short and long term goals?				
7. Does your current Will and Estate plan fully reflect your wishes and needs for the distribution of your assets in the most tax effective way?				
8. If you are a business owner, you are in a job that may be considered 'risk occupation.' If legal action was taken against your family are you sure your assets will be protected from creditors?				
9. Are you certain that your mortgage arrangement is the best you could have, in terms of rates and additional investment opportunities?				

Level 31, Australia Square, 264-278 George St, Sydney NSW 2000 Telephone (02) 9241 7701 Facsimile (02) 9241 7960