



PERSONAL DETAILS FORM

Create Build Protect Finance

How did you hear about us?

Name:

Title	Given Name	Middle Name	Surname	Preferred Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Date of Birth	Gender	Marital Status
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other	<input type="checkbox"/> Single <input type="checkbox"/> Partner

Phone:

Work	Mobile	Tax File Number:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address:

Employment Status

Full-Time	Part-Time/Casual	Self-Employed	Student	Unemployed
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Occup/Employer:

Occupation	Employer	Annual Salary
<input type="text"/>	<input type="text"/>	<input type="text"/>

Citizenship Status:

Australian Citizen	Permanent Resident	Resident Visa
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Home Status:

Own	Mortgage	Renting	Saving	Boarding
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Health Insurance:

Basic	Extras	Provider	None
		<input type="text"/>	

Number/Street:

Primary Street Address	Primary Postal Address
<input type="text"/>	<input type="text"/>

City/Suburb:

State: Postcode:

<input type="text"/>	<input type="text"/>	PO Box:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Tick this box if street address is the same as postal address

Invest. Property:

Yes	No	I am looking to invest in Property
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Other Investments:

Yes	No	I am interested in building my investments
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Personal Insurance

Life	TPD	Income Protection	Critical Illness	I want to review my insurances
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HECS/HELP Debt:

Yes	No	Not Sure
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Superannuation:

Single Fund	Multiple Funds	I want my to review my superannuation	I have a SMSF
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Will / POA

Will & Power of Attorney	Will Only	Last Reviewed Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	No will or POA
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Debts

I want to consolidate my debts	I need help managing my debt to pay off more quickly	I want information on borrowing money
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Cash Flow

I have a budget & surplus income	I have a budget but no savings	I do not have a budget
I want to understand how I can invest surplus funds	I need help managing my money	I want to understand my spending & cash flow

Retirement

I am currently retired	I will retire in the next 5 years	I will retire in the next 10 years
I want to know how I can maximise my retirement income	I want to understand how retirement looks for me	I want help planning for my retirement

Tax Planning

I want to know how I can minimise my tax	I have a tax problem I need to need to sort out	I want someone to help me with tax planning
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CLIENT DECLARATION

You have indicated that you are interested in obtaining information on financial advice and/or services relating to your personal financial affairs. CBP Finance Pty. Ltd. will refer your details to our professional partners that can provide you with this support.

If you elect to proceed with the referral your relevant personal information may be transferred to our professional partners who will assume immediate responsibility for its maintenance and security. You are entitled to request reasonable access to the information the professional partners holds about you. In addition, you may wish to consider requesting a copy of their privacy policy to understand how your personal information will be managed.

Authorise CBP FINANCE PTY LTD to transfer any relevant personal information to the referred professionals

Do not authorise CBP FINANCE PTY LTD to transfer any relevant personal information to the referred professionals

I would like to be added to CBP FINANCE PTY LTD mailing list

Please sign here:

Date: / /

CBP Finance is a CPA practice limited liability by scheme approved under Professional Standards Legislation