

Bad things can happen to good people



Have you considered how you would manage your financial situation if something was to go wrong? Wouldn't you rather have peace of mind knowing your future is protected from the 'What If...?' It is our commitment to you to make certain you are in a financially stable position to manage your situation in the event of accident or illness. It's not something we like to think about but just think for a moment, what if you:

Had an accident and couldn't work



Became seriously ill and couldn't work



Passed Away



Insurance can help protect your ability to earn an income and overcome the financial burden if something happens.

Do you have insurance in place?	Yes	No	Unsure
If yes : Who's covered?	Myself	Spouse	Unsure
What type of insurance cover do you have?	Income Protection	Life	TPD
	Critical Illness	Insurance in super	Unsure
If you couldn't work for an extended period, how long could you continue to pay your mortgage?	Less than 1 yr	More than 1 yr	Unsure
If you were to die prior to the loan being repaid, would you want the property to pass to your family debt free?	Yes	No	
When was the last time you reviewed your insurance?	Less than 1 yr.	More than 1 yr.	Unsure
When was the last time you reviewed your Estate plan including Wills and POA?	Less than 1 yr.	More than 1 yr.	Unsure
Would you like a free no obligation meeting to discuss your insurance planning needs with an insurance specialist?	Yes	No	

If **no**:

Tick to acknowledge you are comfortable with the financial risks associated with not having appropriate insurance and the impact to you and your family's lifestyle by not seeking appropriate advice.

Name:

Telephone:

Email:

Broker Name:

Date: