



Salary / Investment Client Questionnaire

Confidential

U6E Pty Ltd

ABN 32 136 924 313

Trading as

UNIQsol

Dated 15 January 2019

Version 5

Client Name

Consultant Name

Appointment Details

Disclaimer

The contents of this Client Profile are for the sole use of UNIQsol. The details will be treated with the utmost confidentiality in accordance with our Privacy Policy. To view our privacy policy, go to www.uniqsol.com.au.

PLEASE RETURN TO OFFICE AT YOUR EARLIEST CONVINENCE

Lakeside 2
8/10 Liuzzi Street
Pialba, QLD Australia 4655

Phone: (07) 4192 8900
Fax: (07) 4191 4382
Email: admin@uniqsol.com.au

PLEASE READ THESE INSTRUCTIONS

Why do you need to complete this questionnaire?

This questionnaire is designed to help us serve you.

The information you provide will be used strictly for this purpose.

When should you complete this questionnaire?

We have designed the questionnaire to make the collection of information as easy as possible for you. You can answer many sections by writing 'see attached' and we will collate the information from attachments you provide.

We understand some clients may feel uneasy about supplying personal information to a person they have never met or may not wish to provide detailed information before a first meeting. However, we urge you to complete and return the questionnaire before our meeting, as we believe we can have a more accurate and meaningful discussion. We treat your information in accordance with our privacy policy and can assure you it is treated with confidentiality.

Sections for completion

PART 1: PERSONAL DETAILS

PART 2: TAXATION COMPLIANCE & INVESTMENT QUESTIONNAIRE

PART 3: CHECKLIST

What if you can't supply the information?

We will assist you to complete any gaps at our first meeting.

UNIQsol Products & Services

Products and services of interest to you

- Taxation & GST Compliance
- CGT Calculations
- Property Purchase / Sale Apportionments
- Budget & Cashflow Forecasts
- Bookkeeping System Review
- Ownership & Structures
- Buying or commencing a Business
- Estate Planning
- Retirement Planning

Would you like to receive Newsletters from UNIQsol?

- YES
- NO

Would you like to be notified of future seminars?

- YES
- NO

PART 1: Personal Details

	CLIENT 1	CLIENT 2
Title		
Surname		
First Name		
Second Name		
Preferred Name		
Date of Birth		
Place of Birth		
Marital Status		
Residential Address		
Postal Address		
Business Address		
Mobile		
Home Telephone		
Business Telephone		
Email Address		
Preferred contact method		
Primary Contact		
ABN		
TFN		
Referred by / How did you hear about UNIQsol		

Children

Full Name	Date of Birth	Sex	Financial Dependent	Dependent until age	Number of children	Married Y / N

PART 2: Taxation Compliance & Investment Questionnaire

An Overview of Your Situation

How can we help you?

What are the biggest challenges you are facing at this time?

Are there any special personal, family or business circumstances that you wish for us to take into consideration?

Bookkeeping

What type of Bookkeeping system are you using?

- | | | | |
|--|-----------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Manual Cashbook | <input type="checkbox"/> BankLink | <input type="checkbox"/> Phoenix | <input type="checkbox"/> QuickBooks |
| <input type="checkbox"/> MYOB | <input type="checkbox"/> Xero | <input type="checkbox"/> Reckon | <input type="checkbox"/> Intuit |

Your Vision

What do you want your life to look like in the next three years?

Roadblocks – What is holding you back right now?

PART 3: Checklist

- Completed client profile and signed acknowledgement below
- Copy of your last completed Financial Statements and Tax Returns
- Computer Backup of your accounting records (if applicable)
- Any other relevant documents you may want us to review
- Return of all documentation prior to your scheduled appointment at UNIQsol

CLIENT ACKNOWLEDGEMENT

I / WE acknowledge that the particulars in this document are true and have been completed.

Name:

Signature:

Date:

Name:

Signature:

Date:

CONSULTATION / MANAGER ACKNOWLEDGEMENT

Consultant/

Manager:

Signature:

Date:

Consultant / Manager Additional Notes: