

Soft Facts Information Questionnaire

Needs & Objectives – What is the problem and what are you hoping to achieve ?

Affordability – Is this product affordable to you as it will almost certainly be detrimental to you if you surrender or cease contributions in the short term ?

Attitude to Risk – What and how complex is your knowledge, experience and understanding of investment risk ?

Existing Provisions – What existing arrangements or provisions do you already have in place in relation to the needs & objectives being discussed at this time ?

Tax Status – What is your current and expected future Tax Status ?

Soft Information – What are your hopes, fears, feelings and expectations in relation to the needs & objectives we are currently discussing ?

Name _____

Signed _____

Date _____