BURRELL
stockbroking & wealth management

Client's Relevant Circumstances

Client details (MUST BE COMPLETED)							
Title		Full name					
Date of birth		Gender		Occupation			
Employed	☐	Self employed	☐	Retired	☐	Other	☐
If other, please specify							
Do you have any medical conditions?							

Partner details (MUST BE COMPLETED)							
Title		Full name					
Date of birth		Gender		Occupation			
Employed	☐	Self employed	☐	Retired	☐	Other	☐
If Other, please specify							
Do you have any medical conditions?							

Gross income			
Less than $50,000	☐	$100,000 to $250,000	☐
$50,000 to $100,000	☐	More than $250,000 (see note below)	☐

Note: If your income for the last two years has been in excess of $250,000 per annum, or your net assets are greater than $2,500,000, then you could qualify as a 'Sophisticated Investor' as defined under the Corporations Act 2001. This would make you eligible for certain wholesale investment products.

Dependents (children or other)		
Name	**Date of birth**	**Male/Female**

Advisor office use only	
Account #:	
Advisor Name:	

Your assets and liabilities

Assets	Description	$
Home		
Superannuation		
Investment portfolio (please provide a copy)		
Investment property		
Other		
Total assets		$
Liabilities	**Description**	**$**
Home loan		
Investment portfolio loan		
Margin Loan		
Investment property loan		
Other loans		
Credit cards		
Total liabilities		S
Net assets		$

☐ I/we do not wish to supply some or all of the above relevant circumstances and in doing so hereby acknowledge that the financial advice provided to me/us will be based on the information provided.
Warning: Any advice is given on what we consider to be incomplete personal information (relevant circumstances). You should, before acting on any advice, consider the appropriateness of the advice in regards to your objectives, financial situation and needs.