

Request for Retirement Projection Analysis

If you wish to receive a Retirement Projection Analysis please complete the details below and fax form to: 03 9898 2352. Your confidential report will be forwarded to your email address.

Personal Details

Last Name	
First Name	
Date of Birth	
Email Address	

Employment Details

Employer Name	
Date of Seminar	

Financial Details

Current total gross salary	\$	p.a.	(We will apply the 9% SGC)
Current superannuation balance	\$		(May be approximate)
Current salary sacrifice contributions	\$	p.a.	(pre-tax)
Current personal contributions	\$	p.a.	(post-tax)
Age at which you would like to retire			(default is 65)
Income you would like to have in retirement	\$	p.a.	
How long would you like this income to last?		years	(default is to age 85)

Investment Profile (If you are not sure, complete the Risk Profile Questionnaire)

Note: We will project this analysis at the Growth profile unless you nominate a different one.

- Conservative
- Moderate
- Balanced
- Growth
- High Growth

