



GRAPHITE
BUSINESS ADVISERS

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Business Health Check - Information Required

Thank you for your interest in allowing GBA to assist with your financial wellbeings. In order for us to assist you, we require the following information:

Rest assured, we treat all our clients' financial information in total confidence, and will never disclose any information to any one without prior approval from yourself.

Information: please bring allong to your initial meeting:

Business:

Profit and Loss (Management)

Average monthly income for last six months

Average monthly expenses (fixed) for last six months

Average monthly expenses (variable) for last six months

Copy of lastest financial statement prepared by exitsing accountant

Copy of lastest tax rerturn lodge

Personal:

Copy of lastest tax rerturns lodge

Details of all investments

Superannuation:

Copy of latest statement from superannuation fund(s)

Please bring along to our health check meeting