



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 along 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 latest financial statement prepared by exiting accountant

Copy of latest tax return lodge

Personal:

Copy of latest tax returns lodge

Details of all investments

Superannuation:

Copy of latest statement from superannuation fund(s)

Please bring along to our health check meeting