

# Fact Find

Client Name(s)	Gregory Johnson
Adviser Name	Joanne Brassett
Practice Name	Insurance Advisory Service (N S W) Pty Ltd
Licensee	Insurance Advisory Service (NSW) PTY LTD
Date Completed	29/05/2026

## Confidential Client Information

This booklet has been designed to gather only the information necessary for your Adviser to assist you in achieving your financial goals. If you are completing this booklet on your own, please assist your Adviser by completing as much as you can. If you are unsure about the information required, feel free to leave any section blank and discuss this further with your Adviser during your appointment.

### Why we collect this information?

When giving personal advice the law requires Advisers to have reasonable grounds for making any recommendations. This means your adviser must conduct an appropriate investigation into your financial situation, investment objectives and personal needs.

The information requested in this document is necessary to enable your Adviser to make an appropriate recommendation and will be used for this purpose only.

## What happens if you give us incomplete or inaccurate information?

If you give us incomplete or inaccurate information, then we need to warn you the advice you receive may not be appropriate for you. You need to check the advice to determine if it is appropriate for you before you proceed in implementing the advice.

## Privacy Statement

We are committed to ensuring the confidentiality and security of your personal information. A copy of our privacy policy detailing how we handle your personal information is available on request.

## Your personal information

	<b>Client One</b>
Title	Mr
First Name	Gregory
Middle Name	Charles
Surname	Johnson
Salutation	Gregory
Date of Birth	25/06/1957
Age	68
Gender	Male
Marital Status	Divorced
Nationality	Australian
Are you currently in good health? If No, please provide details in notes section	
Any Medical Conditions (including date diagnosed)?	Height: 1.85 Weight: 120.00 BMI: 35.06  Medical history: No Records Family medical history: No Records Claim history: No Records
Are you a smoker?	No
Have you smoked in the last 12 months?	No

## Address details

Owner	Address 1	City / Town	Postcode	Address Type	Residency Status
Gregory	44 Carnegie Street	Edmondson Park	2174	Home	Living with family/friends

### Your contact details

Name	Contact Type	Value	Preferred Contact
Gregory	Mobile	0413908288	Yes
Gregory	Business	0296953888	Yes
Gregory	E-Mail	gjohnson@mondialevgl.com	Yes
Gregory	Telephone	02 9587 3782	Yes

### Your family and dependants

Full Name	Date of Birth	Age	Relationship	Financially Dependent?	Dependent Living with Client(s)
Adam Medici	01/01/1988	38	Child	No	No
Marcus Medici	01/01/1994	32	Child	No	No
Lachlan Johnson	27/01/2008	18	Child	Yes	No

### Your reasons for seeking advice

- Establish a clear and sustainable retirement income plan.
- Support your sons through structured, tax-effective investment bonds.
- Optimise your superannuation through catch-up contributions where appropriate.
- Build flexibility into your retirement strategy, including the option of relocating overseas.
- Strengthen confidence in your investment structure and long-term drawdown planning

### Your employment details

Owner	Employment Status	Occupation	Employer	Gross Basic Annual Income (\$)
Gregory Johnson	Employed	Business Development Manager	Yusen Logistics	\$160,000.00

### Employment notes

Annual Salary \$142,000 + Car allowance \$18,000

### Your retirement products

Owner	Contract Type	Provider	Policy Start Date	Your Contribution	Emp. Contribution	Value
Gregory Johnson	Super	Macquarie	12/11/2021			\$487,288.07

### Your estate planning

	Client One
Do you have a valid Will?	
Is it up-to-date?	
Power Of Attorney Granted?	
Attorney Name	

Signatory		
X		
	Gregory Johnson	Date

Accepted for and on behalf of Insurance Advisory Service (N S W) Pty Ltd by:

Signatory		
X		/ /
	Joanne Brassett	Date