

# TelstraSuper 5-minute financial fitness check



|   | NO<br>I don't know       | MAYBE<br>I might need help | YES<br>I'm reasonably<br>confident | YES<br>I'm absolutely<br>certain |
|---|--------------------------|----------------------------|------------------------------------|----------------------------------|
| If I suddenly lost my job or was made redundant, I know how to organise my finances most effectively.   | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| If my partner or I died prematurely, the family is provided for financially. (i.e. debts paid and income for life).                                     | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| My investment portfolio is structured to achieve my short and long-term goals in the most tax-effective way.  | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| If I lost my home through fire, I am in a financial position to replace the building and ALL of the contents.   | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| If I became sick or injured for an extended period, I can pay my expenses, cover medical bills and maintain my current lifestyle.                       | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| My superannuation and investments will provide enough income to enjoy a financially secure retirement for life.   | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| My current Will, estate plan and power of attorney fully reflect my wishes. Upon my death, my assets will be distributed in the most tax-effective way. | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |
| I understand all the income, investment and taxation strategies and solutions available when I retire.  | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>         |