What to take to your first meeting – your checklist

At the first meeting we will ask questions about your financial circumstances.

Be prepared to answer these questions by taking along the relevant financial information – refer to the checklist.

If you have a partner who will be attending please ensure they also bring the right financial information.

(Note all the information you provide will be kept confidential).

- ❑ Payslips and Group Certificates
- ❑ Latest Tax Returns for both Business and individuals
- ❑ Other Income such as Rental Income and Dividends from Shares
- ❑ Bank and Credit Card Statements
- ❑ Home / Investment Loan Statements
- ❑ Other Loan Statements (e.g. Car loan, leases, share loans, etc)
- ❑ List of all your assets and their values (e.g. Properties, Shares, Managed Funds, etc)
- ❑ Superannuation Account details (including small funds or rollover accounts)
- ❑ Details of your insurances (Life, Trauma, Disability, Income Protection & General Insurances)
- ❑ Details of Will, Powers of Attorney and Binding Nominations.
- ❑ Details of any other entities you may belong to (e.g. Private Business, Family Trust)