



advice & answers
financial services



redefining /
financial planning

YOUR CHECKLIST

– FINANCIAL DOCUMENTATION FOR INITIAL MEETING

What to take to the first meeting – your checklist

At the first meeting we will ask questions about your financial circumstances. You may also be asked to complete a detailed questionnaire. This is considered the cornerstone of good advice.

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.)

- Confirmation of your salary (pay slip, group certificate) or other proof of your income if self-employed.
- Details of any other income, such as rent or dividends from shares or interest from savings.
- Details of your latest superannuation account (latest member statement).
- Your bank and credit card statements.
- Your latest home loan statement (if relevant).
- Details of any other loans you may have (shares loan, managed fund loan, car loan or lease).
- A list of all your financial assets (and their values) other than your home or car. For example, shares, managed funds, an investment property.
- Details of all your insurances, both general (home & contents) and personal (life, income, trauma or total and permanent disability insurances).
- Details of your Will and any other similar items (Powers of Attorney, Binding Nominations).
- Details (if any) of any family trust you may have.
- Centrelink / Department Of Veteran Affairs schedules

Should you wish to reschedule the appointment, a courtesy phone call with 24 – 48 hours notice would be appreciated.

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'your financial advice & answers'

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