

Preparing for your first meeting | Checklist

In order for us to understand your current situation and develop a tailored plan, it's important that you come to your first formal meeting with as much information about your financial situation as possible.

Documentation

- Current Photo Identification (Drivers Licence, Passport)
- Centrelink CRN
- Tax File Number

Income

- Current payslip
- Pension entitlements
- Super entitlements
- Investment income (property, shares, etc)
- Any other income

Expenses/liabilities

- Mortgage or rental payments
- Other loans (investment, car)
- Housing expenses (rates, gas, electricity, water, telephone, building and contents insurance)
- Living expenses (food, entertainment, clothing, transport, education, health insurance, medical fees)
- Personal expenses (sports, hobbies, subscriptions, other insurances, additional super contributions)
- Credit card debt
- Any other expenses or liabilities

Assets

- Residential, holiday and investment properties
- Vacant land
- House contents, collectables, jewellery
- Motor vehicles, boats, caravans
- Bank accounts
- Investments
- Life insurance cash surrender value