

# Preparing for your first meeting | Checklist

It's important that you come to your first formal meeting with as much information about your financial situation as possible to allow us to understand your current situation. Please bring the following:

## Income

- Current payslip
- Pension entitlements, including Centrelink assessment letters
- Super entitlements, including a recent statement showing balance, investment options and last 3 years contributions.
- Investment income (property, shares etc.)
- Any other income

## Expenses and Liabilities

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

## Insurance

- Policy details for any Life, TPD, Income Protection or Trauma
- If in super, a statement/report showing the type of cover, level of cover, premium and any other details