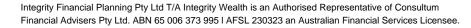
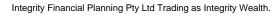
Preparing for your first meeting | Checklist

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.

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







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