

# Preparing for your first meeting | Checklist

We aim to ensure the financial planning process is as streamlined and as easy for you as possible. As such, can you please bring with you some photo identification (eg: driver's licence or passport) to this first meeting.

If you do have copies of the following documents noted below, please bring these to your initial meeting too as this will assist with some of the processes required to start the preparation of your financial plan.

## Information for first meeting (if readily available):

- Photo identification (eg. copy of licence or passport)
- Last tax statement
- Most recent superannuation statement
- Most recent investment statements
- Latest annual insurance statement
- Current loan statements

Following our initial meeting, should you engage PMD Financial Advisers, we will endeavour to obtain a more detailed understanding of your current circumstances (lifestyle assets, investment assets, income and expenses), and will confirm with you if additional information is required.

If you have any queries about the process or the information required, please call us on 03 9824 0001.