

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