What to take to your first meeting - your checklist

At your first meeting, we' ll ask you questions about your financial circumstances.

Be prepared to answer these questions by bringing along the relevant financial information.

If you have a partner who 'll be attending, please ensure they also bring the relevant financial information.

- ☐ Last Payslip and Tax Return
- ☐ Bank Statements
- ☐ Personal Loan Statements
- ☐ Home Loan & Investment Loan Statements
- ☐ Credit Card statements
- ☐ Superannuation Account details (including small funds or rollovers amounts)
- ☐ Any details of Income Streams (e.g. Allocated Pensions, Annuities etc)
- ☐ Share Holding records / including prior years capital losses
- ☐ Managed Funds records
- ☐ Other Income details (e.g. Rental Income)
- ☐ Record of any Funds held elsewhere (e.g. Fixed Term Deposits)
- ☐ Latest Centrelink statement
- ☐ Details of any other entities you may belong to (e.g. Private Businesses, Family Trusts, Unit Trusts, etc)
- ☐ Copy of Will
- ☐ Details of your Insurances (Life, Trauma, Disability and Income Protection)