

Preparing for your initial meeting

Please bring the following information with you to your first appointment:

- ☐ Details of your income eg
 - ☐ pay slips
 - ☐ PAYG summary
 - ☐ salary packaging information if relevant
- ☐ Recent superannuation account statement for each account
- ☐ Recent mortgage statement
- ☐ Other debt information (e.g. credit card, personal loan, car loan...)
- ☐ Personal insurance policy statement/schedule (life/TPD, income protection, critical illness)
- ☐ Photocopy of your driver's license
- ☐ Tax file number
- ☐ Any previous financial plans (also known as Statement of Advice of SoA)
- ☐ Details of any other financial matters that might be relevant

We look forward to meeting with you shortly