

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	
<input type="checkbox"/>	Current payslip
<input type="checkbox"/>	Pension entitlements
<input type="checkbox"/>	Super entitlements
<input type="checkbox"/>	Investment income (property, shares, etc)
<input type="checkbox"/>	Any other income

Expenses/liabilities	
<input type="checkbox"/>	Mortgage or rental payments
<input type="checkbox"/>	Other loans (investment, car)
<input type="checkbox"/>	Housing expenses (rates, gas, electricity, water, telephone, building and contents insurance)
<input type="checkbox"/>	Living expenses (food, entertainment, clothing, transport, education, health insurance, medical fees)
<input type="checkbox"/>	Personal expenses (sports, hobbies, subscriptions, other insurances, additional super contributions)
<input type="checkbox"/>	Credit card debt
<input type="checkbox"/>	Any other expenses or liabilities

Assets	
<input type="checkbox"/>	Residential, holiday and investment properties
<input type="checkbox"/>	Vacant land
<input type="checkbox"/>	House contents, collectables, jewellery
<input type="checkbox"/>	Motor vehicles, boats, caravans
<input type="checkbox"/>	Bank accounts
<input type="checkbox"/>	Investments
<input type="checkbox"/>	Life insurance cash surrender value