

What to bring to the First Appointment

Please try to bring as much as possible, but don't worry if you can't arrange everything.

- 1. Photo Identification i.e. Driver Licence and/or Passport**
- 2. Information relating to your assets, including values / balances of:**
 - Bank accounts and term deposits
 - Home/ property Investments (rental statements / rates notices)
 - Business assets
 - Shares / managed funds / trusts
- 3. Information relating to your liabilities, including balances of:**
 - Mortgage – home
 - Loans – car etc
 - Credit cards
- 4. Information relating to your superannuation funds, including:**
 - Recent statements for all of your superannuation funds
 - Self Managed Superannuation Fund Trust Deed
- 5. Recent statements for your insurances as follows:**
 - Life Insurance
 - Total and Permanent Disability
 - Income Protection
 - Trauma Insurance
- 6. Details of investment structures such as family companies, trusts, etc.**
- 7. Copies of Wills, Powers of Attorney etc.**
- 8. Details relating to your regular income**
 - Salary information, pay slips, contracts, etc
 - Last 2 years tax returns
 - Profit & Loss and Balance Sheet
- 9. Details of any Centrelink entitlements - Pensions, Allowances, Family Tax Benefits Part A & B etc.**
- 10. Any other information that you feel is relevant.**