Financial Planning Checklist

- ☐ Cashflow Template – we can assist you to complete
- ☐ Client Questionnaire – enclosed
- ☐ Risk Profile Questionnaire – enclosed
- ☐ ID Documents (eg. Drivers Licenses, Passport)
- ☐ Copies of 2 recent Pay slips for each partner / Business Income Details
- ☐ Copies of Last 2 yrs Tax returns.
- ☐ Copies of Recent Bank Statements
- ☐ Details / Copies of Latest investment statements (dividends etc)
- ☐ Details / Copies of Latest Superannuation Statements
- ☐ Details / Copies of Mortgage / Home Loan Statements
- ☐ Details / Copies of Credit Card Statements
- ☐ Copies of any Personal Loans (if applicable)
- ☐ Copies of any Investment Loans (if applicable)
- ☐ Life Insurance Policies (Including Insurance Bonds)
- ☐ Copies of full Rates Notice on Family Home
- ☐ Details of Company or Family Trust (if applicable)
- ☐ Contract copies for any properties being sold/purchased under your proposed plan.