Things to bring to your meeting

In preparation for your meeting with Elliot Watson Financial Planning we ask that you have ready the following information.

- ✓ **Identification -** copy of your driver's license(s). If not available, then passport/proof of ID card.

- ✓ **Superannuation -** copy of your most recent superannuation fund. If you have multiple funds, please provide statements for all funds.
  - If you cannot find a statement please obtain:
    - Approximate account balance
    - Membership number
    - Fund provider
    - Risk profile.

- ✓ **Investments -** do you own managed funds, direct shares or an investment property?
  - If so, please provide us with
    - Most recent statement
    - Share holder Reference Number (SRN)
    - Purchase price
    - Date of purchase
    - Number of units
    - Rental Income

- ✓ **Personal Insurance -** do you have any life, total and permanent disability (TPD), income protection or trauma insurance? If so, please provide policy statements.

- ✓ **General Insurance –** please provide statements (if applicable) for:
  - Private health insurance
  - Home and contents insurance
  - Car, boat, caravan, motorbike insurance
  - Business insurance

- ✓ **Debt (Mortgage, Personal Loan, Credit Cards) –** please provide:
  - Home/Investment loan statements
  - Credit card statement(s)

- ✓ **Tax Return**
  - Most recent tax return including tax file number (TFN)
  - Payment summary from your employer.
  - Employment contract and/or last 3 pay slips

- ✓ **Estate Planning** - a copy of your will, powers of attorney.

- ✓ Anything else you feel may be relevant.

If you any questions do not hesitate to contact us: admin@elliotwatson.com.au

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