Lifestyle Assessment and Financial Overview

Your checklist

The list below is intended to be a guide in assisting you to bring some important documents along to your meeting. As this list is intended as a guide only, all items may not be relevant to you.

- ☐ Copy of Identification (e.g. Driver's Licence or Passport)
- ☐ Superannuation Account details (including small funds or rollover accounts)
- ☐ Details of any Personal Insurances (e.g. Life, Trauma, Total and Permanent Disability, Income Protection)
- ☐ Payslips, latest Tax Return and / or PAYG Summary
- ☐ Copy of Will, Power of Attorney etc.
- ☐ Mortgage statements
- ☐ Investment Property details
- ☐ Any details of Income Streams (Allocated Pensions, Annuities, Disability benefits)
- ☐ Share Holding Records, Managed Funds Records
- ☐ Records of any funds held elsewhere (e.g. Fixed Term Deposits)
- ☐ Details of any other entities you may belong to (e.g. Private Business, Family Trust)
- ☐ Bank statements (only related to investments)
- ☐ Credit Card and Personal Loan statements
- ☐ Latest Centrelink / DVA statement

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