



## Financial Planning Checklist

Please note:- it will save much time if you can prepare this information and bring it to your first meeting with our financial planner. Please attach copies of:

- any statements of advice you have received from financial planners
- current statements from individual investments you hold
- bank statements for your self-managed superannuation fund (if applicable)
- insurance policies
- portfolio reports

Thank you!

Name: \_\_\_\_\_

### Investments

(please annex another page if required)

Name of Investment eg Aviva	Name of entity/person that owns the investment/policy Eg John Smith, Smith Superannuation Fund etc	Description of investment/policy eg Master Trust No 3, share name etc	Client number or policy number

### Life / Total & Permanent Disablement Insurance

Name of Policy eg life insurance	Name in which the policy is held eg Smith Superannuation Fund	Description of policy eg \$100,000 life insurance	PolicyNumber

**Trauma Insurance**

Name of Policy	Name in which the policy is held	Description of policy	PolicyNumber

**Income Protection Insurance**

Name of Policy	Name in which the policy is held	Description of policy	PolicyNumber