Financial planning meeting checklist

Before your first appointment with a financial planner, it's worthwhile doing a little advance preparation so you get the most from your meeting.

A good starting point is to get together the documents listed below to take along to your meeting.

Your income and insurance

- [ ] Latest tax return and tax assessment
- [ ] Payslips
- [ ] Information regarding any insurance policies you may have (such as life insurance, income protection cover etc)

Your super

- [ ] Latest Annual Statement
- [ ] Annual Statements for any other funds where you hold accounts

Your assets

- [ ] Bank statements
- [ ] Term deposits
- [ ] Investment properties
- [ ] Shares
- [ ] Any other investments or assets

Your debts

- [ ] Home loans
- [ ] Other loans (such as car loans, personal loans)
- [ ] Credit cards

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