

Useful documents for initial questionnaire

Checklist



Details about your **income and expenses**

- ⇒ most recent **payslip**
- ⇒ most recent income **tax return** / most recent financial report (if self-employed)
- ⇒ estimated / actual **living expenses** (weekly, monthly, quarterly, yearly)



Details about your **assets**

- ⇒ Current **bank statements**
- ⇒ most recent **superannuation statements**
- ⇒ most recent statements for all **investments** - e.g. term deposits, direct shares, managed funds, investment property details



Details about your **debts**

- ⇒ Current **debt statements** – e.g. credit card, personal loans, car loans and other consumer debts
- ⇒ Current **home loan (mortgage) statements**



Details about your **life insurance**

- ⇒ Personal **insurance** policy details - policy number, cover type and cover amount



Details about your **estate planning**

- ⇒ **Wills** and estate planning documents



You may also want to consider:

- Large expected future expenses - e.g. holidays, cars, renovations