

What to take to your first meeting

- Confirmation of your salary (pay slip, group certificate) or other proof of your income if self-employed.
- Details of any other income, such as rent or dividends from shares or interest from savings.
- Details of all your insurances, personal and business (life, income, trauma or total and permanent disability insurances).
- Details of your latest superannuation account (latest member statement).
- A list of all your financial assets (and their values) other than your home or car. For example, shares, managed funds, an investment property.
- Details of any loans you may have (mortgages, shares loan, managed fund loan, car loan or lease).
- Details of credit cards.
- Driver's Licence—identification.
- Other professional advisers.
- Details of your Will and any other similar items (Powers of Attorney, Binding Nominations).
- Details (if any) of any Family Trust you may have.