

Sound Life

A JOURNEY WORTH PLANNING

PRE-MEETING PREPARATION

To assist you in preparing for your first meeting with us, we have prepared this handy checklist.

Please note that many of these items may not apply to your own circumstances and the type of advice you require - just tick off what's relevant to you!

- INCOME & EXPENDITURE**
- ASSETS & LIABILITIES**
- CURRENT & PROJECTED INCOME**
- LATEST PAYSLIPS (IF EMPLOYED)**
- PROFIT & LOSS STATEMENTS (IF SELF-EMPLOYED)**
- SUPERANNUATION/PENSION ENTITLEMENTS**
- STATEMENT OF OTHER NON-INVESTMENT INCOME**
- FAMILY TRUST DISTRIBUTION DOCUMENTS**
- MAINTENANCE PAYMENT AGREEMENT**
- MOST RECENT TAXATION RETURNS**
- ANNUITY INCOME STATEMENTS**
- CURRENT DSS BENEFIT STATEMENTS**