

The Initial Meeting: Things To Bring With You

This is not an exhaustive list and you may have other matters you wish to discuss or issues that are of particular concern to you at present, but an overall financial picture is always helpful. It would also be very helpful if you could download the Risk Profile Questionnaire as well and print and complete this to bring with you.

ID Documents

- Passport *and* Driver's Licence
- Alternatively if either of these are not available:*
- Bank statement
- Recent utility bill

Assets

- Bank Statement
- Building Society / TESSAs
- PEPs
- ISAs
- Shares, Unit Trusts, Bonds
- Share Options

Liabilities

- Mortgage: (The original Offer Letter /
Repayment Method)
- Loans / Overdrafts / Credit Cards:
(Amount Owing / Repayment Details)

Income

- Details of Income
- Investment Income :
- (Interest / Dividends / Rent)
- Pension Income

Expenditure

- Total Monthly Outgoings
- Education Costs
- Regular Savings

Policies

- Life Insurance
- Endowment & Savings
- Health & Medical

Pensions

- Annual Benefit Statement
- Personal Pension Plans