



A list of important things to bring to your meeting:

Key Documents:

Most recent Pay slips

A copy of last year's full tax return (*not just Notice of Assessment*)

Income Stream / Account based pension statements

Any Centrelink schedules by your pension provider

Centrelink income, a statement of Income and Assets (if applicable)

All Investments

Superannuation statement(s) (latest)

Bank statement(s)

Share certificate(s)

Managed fund(s) statement(s)

Investment property(ies) details

All Debts

Home loan(s)

Car loan(s)

Personal loan(s)

Investment loan(s)

Credit card(s)

Personal guarantees

Other Documents:

Details of any Risk Insurances you have
(e.g. Life Insurance, Income Protection, Trauma Insurance)

