

## **List of documents required for financial planning advice (if applicable)**

- Recent payslip(s)
- Share holdings statement(s)
- Last investment statement(s)
- Term deposit statement(s)
- Last superannuation statement(s)
- Clear photocopy of Driver's Licence
- Clear photocopy of Marriage Certificate
- Last insurance renewal statement(s)
- Details of salary packaging arrangements (if applicable)
- Employment contract(s) (if applicable)
- Details of any pension payment(s) that you receive (if applicable)
- Details of any past superannuation payments that you have been paid (if applicable)
- Last home loan statement(s)
- Last investment loan statement(s)
- Last personal loan(s) statement(s)
- Last credit card(s) statement(s)
- Will(s)
- Enduring powers of attorney
- Advance health directive(s)
- Last Centrelink or Veterans affairs statement(s) (if applicable)
- Last Family Assistance statement(s) (if applicable)
- Details of child support (maintenance) payments (if applicable)
- Transitional RBL statement(s) (if applicable)
- Most recent tax return(s), including assessment notice(s)
  - Individual
  - Company
  - Trust
  - Self Managed Superannuation Fund
- Details of your various entities (if applicable)
  - Company details
  - Trust details
  - Tax return(s) of entities
  - Profit & Loss statement(s) of entities
  - Balance sheet statement(s) of entities
- If leaving employment, a letter/statement from your employer re: all of your entitlements
- Any other documents that relate to your financial affairs