



The Handy Checklist

To help you prepare for that first meeting with your chosen financial adviser, it is important that you gather as much personal financial information that you have, as possible. This ensures that the financial adviser is as equipped as they can be when searching for appropriate solutions for you during your first meeting.

Please note that this checklist isn't exhaustive – you may come across more information that is useful or your financial adviser may ask for specific details that are applicable to your current situation. Your financial adviser is there to see you in the right direction; this checklist simply acts as a starting point

	Person 1	Person 1	Joint
Debt information (credit cards, loans, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of work benefits (sick pay, death in service etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of insurance and protection plans (life cover, income protection, payment protection etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage information (amount outstanding, equity, term, product information, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of your cash based savings (amount, interest rates, product terms, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of any pensions, work and private pensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information on investments held (investment date, product type, fund information, maturity date, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of questions/topics to cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any additional notes:
