Preparing for Your First Meeting | Checklist

We're looking forward to starting this journey with you!

To make the most of our time together, it helps if you can bring along any details you have about your finances. The more you can share, the better we can understand your situation and start shaping a plan that supports your goals, lifestyle, and what's most important to you.

- ☐ Latest Tax Return or income details (last two payslips)
- ☐ Details of any Centrelink entitlements (if applicable)
- ☐ Any other income (rental, business, dividends, etc.)
- ☐ Details of your Superannuation/SMSF (including a copy of the most recent statement/s you have)
- ☐ Details of any liabilities (mortgages, car or personal loans, credit cards including interest rates, fees etc)
- ☐ Details of any assets (home, car, property, collectables etc)
- ☐ Investment or share statements (if applicable)
- ☐ Details of any personal insurance policies you currently hold (life, TPD, trauma, income protection)
- ☐ A breakdown of your budget (use the MoneySmart Budget Planner or Spreadsheet Version)

It's perfectly fine if you don't have everything. Just bring what you can, and we'll work through the rest together!