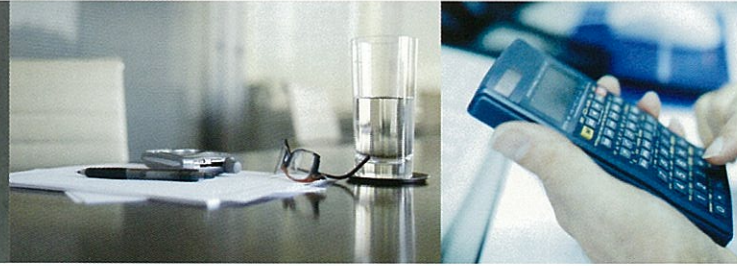


Things to bring



To enable us to provide high quality advice and service it would greatly assist us if you could bring the following items and information to your scheduled appointment.

- Copies of current loan statements (last 6 months)
- Current investment statements
- Existing insurance policy documents
- Statement of existing shareholdings
- Investment property details
- Bank account details
- Details of salary and employee benefits (last 2 pay slips)
- Current superannuation statements – employer and personal (showing current balances & benefits)
- Retirements, retrenchment or redundancy payout details
- Copy of Land Rates Notice
- If self - employed, copy of last 2 years Income Tax Returns