Priority Wealth

Checklist to prepare for your first meeting...

The following is a checklist of information your Adviser might ask you for in your first meeting. It will be important for detailed discussions about your finances.

Please have copies of any items listed below that apply to you, and any other information you consider important for your adviser to know:

Priority Wealth

Suite 7, 11 Ventnor Avenue
WEST PERTH WA 6005
Phone: (08)9322 3325
Fax: (08)9322 7557
web: www.prioritywealth.com.au

Assets

Recent statement for:

- ☐ Bank or term deposit accounts
- ☐ Managed Fund investments
- ☐ Life or disability insurance policies
- ☐ Foreign pensions

Transaction history for:

- ☐ Investment/rental properties
- ☐ Land or other properties
- ☐ Shares, including purchases, reinvestments, bonus issues etc…..

Loans/liabilities

Recent statement for:

- ☐ Home loan
- ☐ Line or credit
- ☐ Investment/rental property loans
- ☐ Other personal loan
- ☐ Credit cards
  - Personal guarantee for another person's loan - Amount $

Income

Recent statement of:

- ☐ Salary - payslip
- ☐ Salary package details (eg: superannuation, vehicle, mortgage, insurance etc…..)
- ☐ Expected employment termination payments (eg: redundancy, annual or long service leave)
- ☐ Centrelink entitlements
- ☐ Super or Allocated Pension entitlements
- ☐ Investment income (eg: rent, dividends, distributions)
- ☐ Any other income source (eg: foreign pension, distribution from trust, business, partnership)

Expenses

Record of expenses, such as:

- ☐ Mortgage repayments or rent
- ☐ Other loan repayments (eg: car, credit cards etc…)
- ☐ Regular tax deductible expenses as shown in your tax return (eg: investment property)
- ☐ Housing expenses (eg: rates, utilities, insurances)
- ☐ Transport expenses (eg: car expenses, fares, taxis etc…)
- ☐ Personal expenses (eg: food, clothing, education, donations etc…)
- ☐ Leisure expenses (eg: holidays, restaurants, memberships etc…)
- ☐ Dependent expenses (eg: childcare or school fees)

IMPORTANT – Please remember to have your ID (eg Drivers licence or passport) so we may make a certified copy at the appointment.