

## What to bring to your meeting

In order that we can fully understand your current circumstances and enable us to provide the best service possible, it would be very helpful if you could have the following information (where relevant) to hand during our meeting.

### Passport

### Driver's Licence

### Most recent Current Account Statement

### Most recent Mortgage Statement

### Income

- Most recent payslip
- Most recent P60
- Most recent P11D
- Last 3 years business accounts

### Completed Income & Expenditure Analysis

### Savings & Investments

- Most recent statement for each savings account that you have
- Most recent statement for each investment policy that you have
- Confirmation of any ISA subscription during the current tax year

### Pensions

- Most recent Statement for each pension that you have

### Insurance

- Original policy schedule for each life assurance policy that you have
- Original policy schedule for each critical illness policy that you have
- Original policy schedule for each income protection policy that you have



## Don't forget...

### Investment Properties

- Date bought & purchase price
- Estimated current value
- Rental income received
- Most recent mortgage statement

### Trusts & Gifts

- Details including value & date of any cash or property gifts that you've made in the last 7 years
- Details including value & date of any gifts in to Trust that you've made in the last 14 years