

# Preparing for Your Meeting

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Below is a list of some of the things we will need to know when you meet with us and some of the items we may ask about. Please ensure you have gathered as much relevant information as possible, the more you have the better. The following list shows some areas to start thinking about before your meeting.

## Personal Situation

- Personal Details
  - Your full name
  - Date of birth
  - A form of identification
- Marital status
  - Are you married; single, in a new or de facto relationship?
  - Do you have any past marriages?
  - Were there children involved in them?
- Family
  - What is your current family structure?
  - Do you have any children?
  - Are they dependent? If so, how long do you expect this to be the case?
  - Do you have parents or grandparents?

## Financial Situation

- Employment
  - Are you employed full time, part time, casual or on contract?
  - Are you self-employed?
  - What is your annual income from employment?
  - How secure is your current employment?
- Your Home
  - Do you own your own home?
  - Do you have a mortgage?
  - Are you renting?
- Other assets
  - Do you have any other sources of income?
  - Do you currently hold any assets outside super?
  - Do you have any investment properties?
  - Are you involved in any companies or trusts?
- Other liabilities
  - Do you have an outstanding car loan?
  - Are you currently in credit card debt?
  - Do you have any other financial obligations to individuals or institutions?

## Superannuation

- Do you have a superannuation account?
- If so, what type of account is it? (Retail, Industry, Self-Managed etc.)
- Your latest superannuation statement would be very helpful.
- Do you have a binding death benefit nomination in your super?
- If you have a self-managed super fund, do you have a current investment strategy? A copy would be very useful.

## Estate Planning

- Will
  - o Do you have a will?
  - o If so, how did you create this will? (With a solicitor, will kit etc.)
  - o When was the last time you updated your will?
  - o Who are the beneficiaries of your will?
- Powers of Attorney
  - o Do you have any powers of attorney including general, medical and financial?
  - o Have you recently reviewed your powers of attorney?
  - o Who are your appointed powers of attorney?