

What to bring to your finance consultation...



CHECKLIST

- Identification - drivers licence, passport, medicare card
- Latest two consecutive payslips
- Latest years group certificate or tax return with notice of assessment

IF SELF EMPLOYED

- Latest two years' personal and company/partnership returns
- Latest two years partnership/company financials
- Latest two years personal notice of assessment

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- Latest rates notice for each property owned
 - Latest three months rental income statements (if current investment property held)
 - Latest six months statements for any home loan
 - Latest three months of *personal loan* statements or original contract
 - Latest three months of *lease* statements or original contract
 - Latest three months credit card statements
 - Evidence of savings held (if any)
 - Latest superannuation statement
 - Latest months main transactional account (in which pay goes into) statement