Our obligation to you is to create a financial plan that suits your specific situation based on your current situation and your goals and objective. To enable us to do so we will need the following documents, which we request you bring to your first meeting or as soon as possible thereafter.

- Your driver's licence or passport
- Copies of your most recent bank statements
- Copies of Credit card statement
- Details and statement of your home loan
- Details and statement of any investment loans
- Details of any personal loans or car loans or any study/HECSs/Help debt/ Buy now pay later type loans
- Most recent payslips
- Tax file numbers
- Superannuation fund statements
- Details / statements of investments outside of super
- Life Insurance details
- A budget if you have prepared one if not a good idea of your living expenditure
- We may also need to capture details of your health history, family health history and your doctor's details especially if you are looking for Insurance advice.
- Always good to come with some notes on what your expectations are from the meeting, any specific goals you are looking achieve and any questions you would like answers too.

All information collected from you is dealt with the strictest of confidence. Please refer to our privacy statement