My planning appointment checklist

HOSTPLUS
expect more

We've created a checklist of important documents to bring along to your initial meeting with a financial adviser.

Key information

- [ ] Payslips
- [ ] Tax File Number (TFN). This is in case we need to check any details with the Tax Office.
- [ ] A copy of last year's tax return(s)
- [ ] If you are receiving Centrelink income, a statement of Income and Assets. This can be requested from your Centrelink office.

Investments

- [ ] Bank statements
- [ ] Term deposits
- [ ] Shares
- [ ] Superannuation account(s)
- [ ] Investment properties
- [ ] Managed funds

Debts

- [ ] Home loans
- [ ] Credit cards
- [ ] Personal loans
- [ ] Car loans
- [ ] Investment loans
- [ ] Personal guarantees

Insurance

- [ ] Details of any risk insurances you have e.g. Life insurance, Income protection, Trauma insurance.

If you need more information simply call **1300 HOST*PLUS* (1300 467 875)**, 8am–8pm, Monday to Friday or visit **hostplus.com.au/advice**

An Industry SuperFund

Industry Fund Financial Planning