



DOCUMENTS TO BRING TO YOUR MEETING

Superannuation and Investments

A copy of your most recent fund statement(s) confirming:

- Fund Name(s)
- Membership number(s)
- Approximate account balance(s)
- Investment option(s)

Personal Insurance

- Policy statements for any Life, Total and Permanent Disability (TPD), Income Protection or Trauma insurance held; or
- Details of any policies held

Lending (Mortgage, Personal Loan, Credit Cards)

- Home/Investment loan statement(s)
- Credit card statement(s)

Identification

- Copy of your driver's licence or passport
- Copy of your Marriage Certificate (if applicable)

- Any other relevant financial information

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