

PLEASE HAVE THE FOLLOWING DOCUMENTS AVAILABLE FOR OUR MEETING:

**Income**

* Copy of latest payslip.
* Copy of last trading accounts for self-employed and limited companies.
* Details of any maintenance payments received (where applicable).

**Financial Commitments**

* Latest credit card statements.
* Details of all loans to include: name of provider, start date, end date, outstanding balance and monthly repayment.
* Confirmation of any childcare costs.
* Completion of expenditure forecast (where previously provided).
* Latest mortgage statement.
* Details of any maintenance payments (where applicable).

**Identification**

* Valid UK Passport or UK Driving License.

**Retirement Planning**

* Latest statement for all existing pension schemes including deferred occupational schemes.

**Savings and Investments**

* Latest statement for all savings and investments accounts, including ISA.
* Details of any company shares held.
* Details of any investment properties owned and rental income received.

**Protection**

* Policy schedule/ document for all existing life, critical illness, income protection and private medical insurance plans.