



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.