

# Confidential Information Checklist

Bring the following documents to your Prowealth Pathway Meeting.  
Where possible please try to have photocopies ready.

All information or documents provided are strictly confidential and will be shredded securely upon your request.



**Please call us on 1800 13 22 64 should you have any questions.**

## Identification – You will need to bring 100 ‘points’ of identification

- |  |  |
|--|--|
| <input type="checkbox"/> Drivers License 40 points | <input type="checkbox"/> Birth Certificate 70 points |
| <input type="checkbox"/> Credit Card 25 points     | <input type="checkbox"/> Passport 70 points          |
| <input type="checkbox"/> Medicare Card 25 points   |  |

## Statements - Where applicable, bring the most recent one (1) month statement of any -

- |   |                                       |   |  |
|---|---------------------------------------|---|--|
| <input type="checkbox"/> Car Loans      | <input type="checkbox"/> Credit Cards | <input type="checkbox"/> Business Loans | <input type="checkbox"/> Any other loans |
| <input type="checkbox"/> Personal Loans | <input type="checkbox"/> Store Cards  | <input type="checkbox"/> Overdrafts     |  |

## Current Home

- Most recent six (6) months – Internet statements are adequate, but one (1) original will be required.  
 Council Rates  Water Rates

## Current Investment Properties

- Most recent rental statement from your property manager  
 Council Rates Notice

## Income

- If PAYG - Two (2) most recent pay slips  
 Latest Group Certificate.  
 If Self Employed - Last two (2) years' tax returns – business and personal statements required.  
 Family Allowance Statement – (If your children are under 12 years old)

## Super

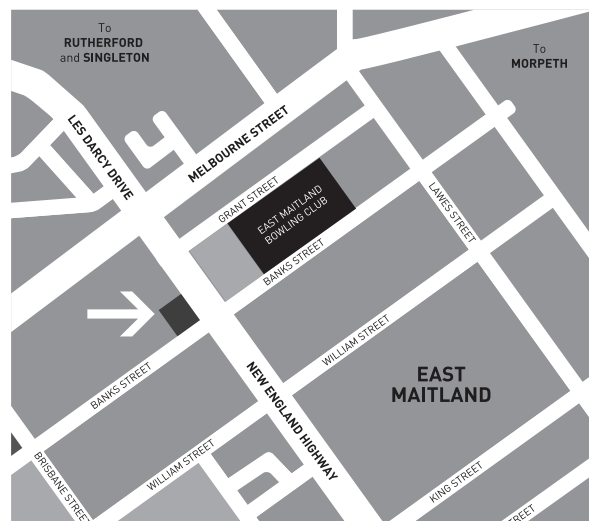
- Most recent Superannuation statement for each fund (usually issued twice per year).

## Other

## Meeting at a venue near you



**Prowealth Investments  
Gosford Office  
Suite 8 / Level 2  
10 William St, Gosford  
Best parking at Imperial Centre Carpark**



**Prowealth Investments  
East Maitland Office  
139 New England Highway  
(Cnr of Banks St), East Maitland  
Best parking in Banks Street**