

Help Us Help You

In order to get an accurate assessment of your current financial circumstances, could you please have the following documents available at the appointment.

ID and Assessment Requirements -

Identification – 100 'points'

- Drivers license or Passport (40 points)
- Birth Cert / Passport (70 points)
- Medicare Card (25 points)
- Credit / Store Cards (25 points)

Income

- Two (2) most recent pay slips
- Latest group certificate
- Family allowance statement (If your children are under 12) (usually issued twice per year).

If Self Employed

- Last two (2) years' tax returns – business & personal required. We will provide an Advisor Authority form to complete for us to contact your accountant if you don't have them on hand.

Other Recent Statements

- Credit / Store Cards
- Car Loans

Home

- Rates Notice
- Most recent home loan statement (for each loan split if applicable) or
- Screen Shot from Internet banking showing account balance, redraw (if applicable) and interest rate.

Existing Rental Properties

- Rates Notice
- Rental statement from Property Manager
- Most recent loan statement (for each loan split if applicable) or
- Screen Shot from Internet banking showing account balance, redraw (if applicable) and interest rate.

Note

Last (6) months of home loan statements will be required for a re-finance if applicable.

Super

- Most recent Superannuation statement for each fund (usually issued twice per year).
- Life / TPD / Income Protection Policy summaries if applicable.

If you have any questions, don't hesitate to contact Daniel on 0412 656 600.

Privacy Statement Data Collection

Prowealth safeguards your personal information by use of the latest in security technology. You can read our full privacy policy at prowealth.com.au/privacy.

Prowealth will not share your information with any person or company not associated with the Prowealth Group of companies unless necessary to provide the advice requested and only after your consent.

The information requested in the form is necessary to enable recommendations to be made by us.

General Advice Warning

Any discussions during this meeting have not taken into account your objectives, financial situation or needs; and you should, before acting on the advice, consider the appropriateness of the advice, having regard to your objectives, financial situation and needs & seek professional advice. Prowealth Corporation Pty Ltd & Prowealth Holdings Pty Ltd do not provide financial product advice nor recommend any financial products.

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