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INSIGHT WEALTH PARTNERS
Putting you first

Insight Wealth Partners Appointment Checklist

When we complete the needs analysis on your current situation, either at the first or a subsequent meeting, you can help by being prepared. The list below is designed as a checklist to allow completion of an accurate Needs Analysis where a client is electing to receive comprehensive advice.

	Notes
☐ Most recent Superannuation Statement	
☐ Does your employer permit Salary Sacrifice?	_____
☐ Most recent Account Based Pension statement (if applicable)	_____
☐ Most recent Life/TPD/Income Protection/Trauma Insurance renewal notice	_____
☐ Investment portfolio valuation, rental income, expenses	_____
☐ Most recent Centrelink assessment (if applicable)	_____
☐ Your identified disposable income (a budget checklist is also available)	_____
☐ Your Will (if estate planning advice is to be included)	_____
☐ Your Income details. (Payslip for employees, Financial Statements for self-employed)	_____
☐ Details of loans e.g. mortgage statement	_____
☐ Self-Managed Superannuation Fund Trust Deed and written Investment Strategy (if applicable)	_____
☐ Details of your financial structure where entities such as trusts and private companies apply	_____

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Please Note: This list is not exhaustive. We may discover other areas that we need to investigate. It is also not compulsory. If you can't find something we can work with you to obtain the information if it is relevant to the advice you seek.