

# INFORMATION CHECKLIST



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1. **Personal Identification** - Passport and Driving Licence.
2. **Proof Of Income** - If employed, payslips and P60. 
  - If self-employed, or company director, last 3 years accounts.
  - If retired, proof of income for pensions you are in receipt of
3. **Mortgage** - Copy of your mortgage offers for all mortgages.
4. **Other Borrowings** - Statements for any loans, credit cards or HP agreements.
5. **Pensions** - Policy documents for all pensions that you are not in receipt of.
6. **Cash Savings** - 
  - Account information to show amount invested, name and address of provider and account criteria (any notice period etc)
7. **Investments** – Equities/Bonds/Stocks 
  - Information to show name and address of provider, amount invested, Policy/ref number, date invested and current value.
8. **Investments** - Property 
  - Information to show the address of the property, the purchase price, the date of purchase, its current value and rental income.
9. **Life Insurances, Protection and Savings Policies** - Policy documents
10. **Other Insurance Policies** - Policy documents
11. **Trusts** - Details of any trusts where you are a settlor, trustee or beneficiary.
12. **Wills** - Please bring copies of your most up to date wills.