

Client Name:-

Pre meeting checklist

**The information below is required in order to complete a full fact find.
Please bring as much information as possible to the meeting.**

		Client (tick)	Partner (tick)
Identification documents	Driving license		
	Passport		
	Work pass		
	Gas bill		
Tax details	Tax Office		
	Tax Reference		
National Insurance Number			
Income confirmation	Latest pay slip		
	P60		
	Latest accounts		
Bank statement			
Analysis of expenditure			
Accountant's details			
Solicitor's details			
Doctor's details			
Copy of Will			
Recent mortgage statement			
Pension policy details			
Life assurance policy details			
Critical illness policy details			
Income protection (PHI) policy details			
Investment plan details			
Schedule of other direct investments			
Building Society pass book			