

Documents Checklist

Please bring as many of the following items of information with you to our first meeting along with anything else that you think might be relevant.

Documents Required	Available Yes/No	Notes
Birth Certificates		
Marriage Certificates		
Passport or Photo Driving Licence		
Recent Utility Bill (dated within last 3 months)		
Recent Bank Statement (dated within last 3 months)		
Investment plan statements		
Pension plan statements		
Health & Life Insurance Details		
Mortgage Offer & Last Statement		
Copy of most recent payslip		
Copy of P60		
Copy of Will, Power of Attorney & Living Will		