

Meeting Preparation Checklist



Once you have decided that you wish to engage our services and we are also happy to proceed, we will seek to gather all necessary information that we will need to know, to advise you further.

We will seek to understand your requirements, priorities, goals and objectives as well as your current circumstances and where you aspire to be. We will also outline the various risks that you may encounter in your journey.

This process can take some time where we need to write to a third party such as an existing provider for further information.

In order that this step may run as smoothly as possible, we will need to complete various documents.

Your Information - To help us to begin this, please provide details of the following information either before or at your meeting:

- Details of your present income and its source (Gross income per annum & net amount per month)
- A breakdown of your current expenditure (see our expenditure budget on our website for a useful template).
- Details of your life policies, endowment plans or other protection policies.
- Details of your pension schemes, whether deferred or current.
- Details of your investments, ISAs, stock portfolios.
- Details of your current cash position such as savings in Banks, Building Societies and National Savings.
- Details of your current property, whether your main residence or additional property, including the current values.
- Details of any liabilities that you have, such as a mortgage or loan, the monthly payments, term remaining, interest rate, amount borrowed and amount outstanding.
- Details of your will, power of attorney arrangement and any other estate planning you have undertaken.

Identification and Proof of Address - Please provide some identification such as a current UK passport or photo driving licence, along with an original utility bill or bank statement (less than 3 months old) showing your name and current address.

Please note that we will need to see original documents.

Thank you.

For further information or to discuss your requirements, please contact us:

www.loughtons.co.uk

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