



## Your Consultation Checklist

You	Your Partner	Item
<input type="checkbox"/>	<input type="checkbox"/>	Gross and net income (a recent payslip will suffice)
<input type="checkbox"/>	<input type="checkbox"/>	Current monthly expenditure
<input type="checkbox"/>	<input type="checkbox"/>	Any planned capital expenditure
<input type="checkbox"/>	<input type="checkbox"/>	Monthly lifestyle expenditure in retirement
<input type="checkbox"/>	<input type="checkbox"/>	National Insurance number
Details of:		
<input type="checkbox"/>	<input type="checkbox"/>	Life insurance and protection policies
<input type="checkbox"/>	<input type="checkbox"/>	Savings and investments
<input type="checkbox"/>	<input type="checkbox"/>	Pension arrangements
<input type="checkbox"/>	<input type="checkbox"/>	Mortgages (including type and duration) Personal loans and credit card balances
<input type="checkbox"/>	<input type="checkbox"/>	Your parents situation (if to be discussed)
<input type="checkbox"/>	<input type="checkbox"/>	A copy of your current Will

Notes: