

What you need to fill in the fact find

INCOME

- A recent payslip to give your annual salary (and your partners if applicable).
- Monthly expenditure.
- Any information you may have on employer sickness and death in service benefits.

SAVINGS

- The value of any cash and investment-based accounts (and your partners if included in your plan).

PENSIONS

- The value of any previous and current pensions, including both personal and workplace pensions (and your partner if included in your plan).
- The percentage that you and your employer pay into your workplace pension (our Coaches maybe able to help you with this).

MORTGAGE

- Your policy documents from when you took out your mortgage and a recent mortgage statement (this will show you your mortgage payments, term, interest rates, etc).

PROTECTION

- Your policy documents and a recent statement.

LOANS/FINANCE

(I.E. CARS/CREDIT CARDS)

- The amount outstanding, the re-payments and your interest rates.