



Fact Find Checklist

INCOME

- Information regarding your gross 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).

PENSION

- 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.

LOANS / FINANCE (E.G. CARS / CREDIT CARDS)

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



IF YOU DON'T HAVE ALL THE INFORMATION TO HAND THEN DON'T WORRY, YOUR COACH WILL HELP YOU WITH THIS.