



INITIAL MEETING OVERVIEW & CHECKLIST

01204 365165

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WHAT TO EXPECT FROM YOUR INITIAL MEETING

Seeking expert advice on your finances is a big step and we're here to help. Our Initial Meeting might push you a step or two out of your comfort zone, but it's important for us to know what's important to you and what you would like your future life to look like.

If you're not entirely sure what we're going to cover, here are some of the things you can expect us to be talking about in our meeting:

YOUR PASSIONS

You should be prepared to talk about your passions; your financial and life goals and what you want to use your money for.

Your goals are unique to you, so the more detail you can provide us with, the better. What is it that you want to do? How often do you want to do it? How much do you expect it to cost?

Once we know what you're passionate about, we can help you to live life to the full, with the money that you have.

YOUR PERSONAL LIFE

- We want to know about you – not just your money.
- We're likely to talk about your family, your job, your health and your background.
- Your relationship with money; what it means to you, what is it for and what will it allow you to do.
- Your past experiences will shape your financial and life decisions, so it is important that we know about these too.



YOUR FINANCES

It's important that we understand exactly where you are financially.

We need to know about what you own and what you owe, as well as what you earn and what you spend. The more you tell us, the more accurate your future plans will be.

The checklist below details the information that will help us with our discussion.

Please contact us if you need any further information, simply call the office on: **01204 365165**.

CHECKLIST

Please can you consider these and bring any information with you, as this will help make our time more productive.

Details of what your future plans are	
Details of any assets you own	
Details of any debts/liabilities	
Details of current income	
Details of any investment plans, personal pension arrangements and insurance policies	
Any work/occupational pension schemes and any other employee benefits (e.g. on death or illness)	
Any other information you think would be useful	

Please bring the following information to our meeting:

Your NI number(s)	
Your passport(s)	
A utility bill or bank statement dated in the last 3 months	