MAT WHITE FINANCIAL SERVICES

What should I bring to an adviser meeting?

ITEM	✓
Original identification (passport, driving licence etc)	
Most recent bank statement (last month)	
Last mortgage statement or rent book	
Credit card balances and statements	
List of liabilities / debts	
Details of wills, trusts, Power of Attorney etc	
Council tax bill or other utility bill as proof of address (not mobile phone)	
Details of all savings and investments	
Insurance policy details (life insurance, home insurance etc)	
Pension details including last statement (s) if available	

EMPLOYED	
Details of any benefits as an employee (eg health cover, pension etc)	

SELF EMPLOYED	
Last 3 years' SA302 statements from the Inland Revenue **OR** Last 3 years' certified accounts if accountant used	
Business agreements where appropriate	
Business liability, director and officer insurance policies if applicable	

Please note that due to the FCA guidelines, with the exception of online bank statements, we can only accept original documents, not scans or photocopies.

Should valuable documents such as a driving licence or passport be requested at a later date, we advise you to post these via Royal Mail 'Signed For'. We will return your documents using the same method as was received by us. Alternatively, you are more than welcome to come to our office during working hours whereby we can take a copy and return to you immediately.