



## Pre-Call Information Checklist

This checklist will help make sure that you have all the information that our advisors will need to give you the best advice possible. If you don't have the information to hand when you call, don't worry, you can provide your advisor with estimates instead.

### Household Income

- Salary (after tax and deductions)
- Benefits

### Expenditure

- Mortgage/rent
- Utilities (gas, electric, water)
- Phone (landline and mobile)
- Internet
- TV (license, digital/satellite etc)
- Housekeeping (food, cleaning products etc)
- Travel (public transport, fuel costs etc)
- Clothing
- Newspapers/magazines
- Pets
- Hobbies, clubs and societies
- Any other regular expenses

### Assets

- Property
- Car
- Shares/bonds
- Savings/endowments

### Debts

- Name of creditor
- Type of debt (loan/overdraft/credit card etc)
- Outstanding balance
- Contracted monthly payment