

Pre-Call Information Checklist

This checklist will help make sure that you have all the information that your advisor 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. Your advisor will be able to access your [Experian](#) credit file during your appointment with your consent.

Please note that our advisors will only ever call you at your request. The number that will display on your phone is 01254 778400.

Household Income

- Salary (after tax and deductions)
- Benefits

Household Expenditure

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

Assets

- Property
- Vehicles
- Shares/bonds
- Savings/endowments/pensions

Debts

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