



Your checklist

Please bring the following financial documents listed below to your Discovery Discussion, along with any other financial information which you think may be useful.

- Your income sources, including payslips and/or tax returns
- Details of any investments, share holdings or bank account
- Details of your mortgage and other debts
- Early retirement
- Your superannuation fund statements
- Personal insurance policy schedules

What are your financial concerns or fears?

What do you want from your partnership with Prosperity Partners?

If there was one thing we could 'get right' for you, what would that be?

