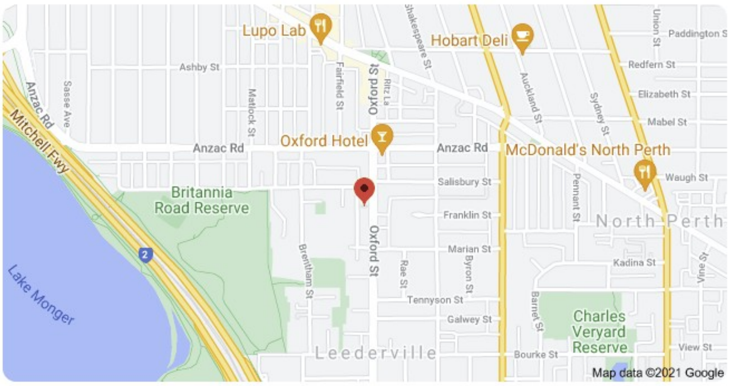
What to Bring to Your Meeting

You may be wondering what you should bring with you when you meet your Quest Advisor – below is a list of useful items to bring along.

- **Your current ID** – preferably your driver's licence (we will need to copy and certify your identification).
- **Income Information:** Most recent payslip or if self-employed a copy of your current Balance Sheet and Profit & Loss Statement.
- **Most Recent Tax Returns:** Individual Tax return. Your income tax return helps us determine your tax efficiency.
- **Current Bank Statements:** cash, savings, offset accounts and term deposits.
- **Current Investment Statements:** Managed funds, Share Portfolios, and your Superannuation statements. This information will allow us to analyse your investments and make certain that they match your goals and risk tolerance.
- **Loan Information:** Mortgages, Car Loans, credit cards, and any personal loans. We need to know about any outstanding debt/loans so we can discuss how best to manage cashflow and debt repayments.
- **List of Assets:** Any other items of value which are not included on account statements.
- **Spending Information:** Current budget report. If you haven't completed one for a while you can visit our website and select Resources-Quick links and then the MoneySmart Budget Planner. This is a simple budgeting tool to help you work out where your money is going.
- **Life Insurance Policies**: Current insurance policies held. We can review the levels of cover you hold and the definitions of policies to ensure that are still relevant to your circumstances.
- **Other documents:** Any other documentation that you wish for us to review that may be relevant to your financial goals and objectives.



You will find our office at:

Quest Advisory Group
Unit 1, 341 Oxford Street, Leederville.

There is free street parking and 2-hour free parking across the road near the school.