



Integritas Financial Planners Ltd

Nurture • Grow • Protect

## Your First Meeting Checklist

Ready for your meeting? Please bring the following:

<b>Proof of ID:</b>	<ul style="list-style-type: none"><li>a. Passport or</li><li>b. Driving Licence</li></ul>
<b>Proof of Address:</b> (Showing name and home address dated within the last 3 months)	<ul style="list-style-type: none"><li>a. Recent Utility Bill or</li><li>b. Council Tax Bill or</li><li>c. Bank Statement</li></ul>
<b>Policy Statements</b>	<ul style="list-style-type: none"><li>a. ISAs</li><li>b. Investments</li><li>c. Mortgage Statements</li><li>d. Pensions</li><li>e. Protection</li><li>f. Savings</li></ul>
<b>Evidence of earnings</b>	<ul style="list-style-type: none"><li>a. Latest Pay slip</li><li>b. Latest P60</li><li>c. Latest Tax Return</li><li>d. Latest Tax Coding Notice</li></ul>
<b>Company Information</b>	<ul style="list-style-type: none"><li>a. Latest Set of Company Accounts (if applicable)</li><li>b. Certificate of Incorporation (if applicable)</li><li>c. Proof of address for your business (e.g., bank statement)</li></ul>
<b>Other Information</b>	<ul style="list-style-type: none"><li>a. Copy of your Will and any Trusts (if applicable)</li><li>b. Anything else you think is relevant</li></ul>