

Investment meeting preparation list

It is important for your adviser to have a full picture of your financial situation so that the advice you are given can take into account all relevant factors when constructing your Investment Plan. It can be useful to think about it in terms of your current situation and any future potential additions to your investment capital.

CURRENT SITUATION:

- Details of KiwiSaver or other employer superannuation plans
- Any relevant Trust deeds or Powers of Attorney
- Any direct investments in shares or other financial instruments
- Any overseas investments or pension funds
- Other income such as from investment properties
- Cash accounts and term deposits
- Debt levels, and future obligations
- Details of insurances
- Business valuation

FUTURE CONSIDERATIONS:

- Any future lump sums eg. inheritances, maturing term deposits
- Savings goals
- Retirement objectives
- Family needs and circumstances that may require support
- Retirement timeframe
- Business exit plans
- Estate planning objectives
- Cashflow related to acquisition and sale of lifestyle assets