MY FINANCIAL CHECKLIST



Preparing to see a financial adviser can feel intimidating. That's why we've compiled this checklist, so you know what information will be asked for and to give you a snapshot of the health of your finances.

BASICS:		
Salary (Monthly)	\$	
Bonus	\$	
EXPENDITURE:		
Rent	\$	
Essentials	\$	
Fun	\$	
ASSETS (CASH):		
Bank Desposit	\$	
Cash	\$	
Overseas Money	\$	
PENSIONS & INV	ESTMENTS:	
MPF	\$	
Overseas Pensions	\$	
Shares	\$	
Investments	\$	
Property	\$	
Others	\$	
DEBITS:		
Credit Cards	\$	Paid off each month?
Loans	\$	
Mortgage	\$	
Other	\$	
GOALS:		
1.		
2.		
3.		
If I won the lottery, it would mean		

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