

# YOUR FINANCIAL CHECKLIST

Preparing to see a financial advisor 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 Deposit   | \$ |
| Cash           | \$ |
| Overseas Money | \$ |

## Pensions & Investments:

|                   |    |
|-------------------|----|
| MPF               | \$ |
| Overseas Pensions | \$ |
| Shares            | \$ |
| Investments       | \$ |
| Property          | \$ |
| Others            | \$ |

## Debts:

|              |    |                      |
|--------------|----|----------------------|
| Credit Cards | \$ | Paid off each month? |
| Loans        | \$ |                      |
| Mortgage     | \$ |                      |
| Other        | \$ |                      |

## Goals:

|  |
|--|
| 1.                                     |
| 2.                                     |
| 3.                                     |
| If I won the lottery, it would mean... |
|  |