

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...