



## What to bring to your insurance appointment

Please bring (where relevant) the following documentation / information to the meeting:

Income	<p>Information of all sources of income, including:</p> <ul style="list-style-type: none"> <li>• All earnings</li> <li>• Pension income</li> <li>• Benefits and tax credits</li> <li>• Income from savings (including dividend income)</li> <li>• Rental income</li> </ul>
Outgoings	<p>Details of your expenditure, including:</p> <ul style="list-style-type: none"> <li>• Transport</li> <li>• Utility and other bills</li> <li>• General living costs</li> <li>• Regular contributions to existing plans</li> </ul>
Credit commitments	<p>Please bring to the meeting details of any credit commitments (to include the outstanding balance and the monthly payment amount) such as:</p> <ul style="list-style-type: none"> <li>• loans</li> <li>• credit cards</li> <li>• car finance and</li> <li>• hire purchase agreements</li> </ul>
Existing Arrangements	<p>Details of your existing arrangements / policies:</p> <ul style="list-style-type: none"> <li>• Current mortgage(s)</li> <li>• Rent</li> <li>• Buy to let portfolio, including details of any mortgages attached to these properties</li> <li>• Insurance policies (e.g. buildings and contents, cover in place to protect your mortgage)</li> <li>• Employer benefits (such as sick pay, life cover, private medical insurance)</li> </ul>
Contacts	<p>Details of your professional contacts:</p> <ul style="list-style-type: none"> <li>• Estate Agent</li> <li>• Solicitor</li> <li>• Accountant</li> </ul>
Third parties	<p>If you are acting on behalf of another individual we will need to see:</p> <ul style="list-style-type: none"> <li>• Power of attorney, letters of administration or grants of probate</li> <li>• Written confirmation from the individual that you have authority to represent them</li> </ul>