GETTING TO KNOW YOU
THE FOUR PILLARS OF FINANCIAL PLANNING

In order to provide you with appropriate advice which is suitable for your circumstances and requirements we need to ensure that you supply us with your comprehensive financial details.

We need to complete what we refer to as **'The Four Pillars of Financial Planning'** and gather information about your Income, Expenditure, Assets, and Liabilities, together with your Estate Planning.

Please supply the following so that we can understand your current situation and advise you appropriately. We do not need to see the originals and you can scan and upload copies to your Personal Finance Portal (PFP) account.

- **Proof of Income**
  P60s & HMRC coding notice or if self-employed most recent annual accounts & HMRC statement, can be scanned and uploaded in PFP
- **Expenditure Analysis**
  Completed in My Profile in PFP
- **Recent Bank Statements**
  Can be scanned and uploaded in PFP
- **Copies of existing plans, investments, & insurances**
  Linked in My Profile in PFP
- **Details of Property**
  Addresses & approximate values should be added to My Profile in PFP. We obtain copies of your title deeds with our Land Registry account.
- **Liabilities**
  Link Credit Card, Loan & Mortgage accounts in My Profile in PFP
- **Estate Planning**
  Copies of Wills, Trusts, & Lasting Powers of Attorney, including; details of Executors, Trustees, & Attorneys and where your documents are stored

You should aim to complete your PFP personal profile to 100% and the 'Personal Finance Portal (PFP) Updating Your Profile' guide has been prepared to assist you in adding and updating your information this can be found in the documents area or by following the link.

V1.0