

**Now that you've
decided to work with
CACTUS WEALTH for
your Financial Plan,
your Advisor will need
some more
information.**

**There are some things
that would be helpful
for you to think about
prior to your Planning
session.**

**Your Advisor will
need to know more
about your Family,
your Dependents and
your current financial
situation.**

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FIRST APPOINTMENT CHECKLIST

CREATING YOUR FINANCIAL PLAN
WITH CACTUS



BACKGROUND INFORMATION

- **Dependent Information** (e.g names, date of birth, relationship)
- **Monthly/annual living expenses.**
- **Income sources** (e.g employment, child support, alimony, government assistance, investment income, overtime, allowances, side income)
- **Most recent NSSF and or company savings plan statements and policies.**
- **Most recent Income Tax return and notice of assesement** (last two years, if possible)
- **Insurance Information** (if you dont have your policy handy, bring in a summary with basic information on premiums, covergae, face value and beneficiaries).
- **Any previous planning documentstion** (Budgets etc).

WHAT IS FINANCIAL PLANNING?

Financial Planning is the process of wisely managing your finances so that you can achieve your goals and dreams - while at the same time helping you negotiate the financial barriers that inevitably arise in every stage of life.

ASSETS

- **Account Statements from Financial Institutions including Banks, SACCOS, Investment Firms** (e.g chequing, Savings, Investment Accounts).
- **Estimated value of other assets** (Home, Car, Land etc).
- **Loans to family members or friends.**

LIABILITIES

- **Mortgages.**
- **Outstanding Loans** (e.g credit card debt, line of credit, student loans, car loans etc).

ADVISOR DETAILS (Optional)

- **Legal (Lawyer).**
- **Tax (Accountant).**
- **Other (Investment, Insurance Advisor and/or Planner).**

ESTATE (Optional)

- **Wills and supporting documentation.**
- **Power of Attorney or Mandates.**