

Fact Find Checklist

Below is a checklist to help you gather the documents and information you will need to complete the fact find. Some of these areas may not be applicable to you. However, please note if you are including a partner, the questions apply to them as well.

Savings:

- The value of any cash and investment-based accounts and any regular monthly contributions. (This includes your current account where most of your day to day transactions take place)

Current, Previous or Private Pension Details:

- The total amount accumulated within any current/ previous/ private pensions including any monthly contributions from you and your employer. This information can be found in your most recent pension statement, your pay slip or by speaking to the HR department.

Mortgage Details:

- The mortgage type, outstanding amount, interest rate, mortgage term and the monthly repayment amount. All this information can be found in your most recent mortgage statement.

Loans/ Finance:

- (i.e. Car finance, loans, credit cards):
The amount outstanding, monthly repayments, interest rate and the length of the contract.

Protection details:

- The protection type, monthly premiums, policy end date and the amount covered for.