Cleardocs
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Information Checklist

To create a Statement of Advice document package, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

Statement of Advice

Client/member information

- [ ] Name and address details.
- [ ] Occupation, intended retirement age and number of dependants.
- [ ] Financial circumstances including:
  - income and expenses.
  - assets and liabilities.
  - pension accounts.
- [ ] Health condition.

Fund details (for existing funds)

- [ ] Trustee name and ACN, if a company.
- [ ] Financial position including:
  - income and expenses.
  - assets and liabilities.

Recommendations

- [ ] What recommendations you are making.

AFSL details

- [ ] The areas you are licensed to advise in.
- [ ] How you will charge for the initial consultation.
- [ ] The fees you will charge for preparation of the Statement of Advice.
- [ ] Estimated ongoing fees and scale of fees.

Notes