

# Finances Meeting Preparation Pack

## Introduction

This pack is for information only. It is designed to help you gather the information often required in financial settlement matters. You may not need all of the documents listed. Your solicitor will guide you on the documents required in your matter.

## Income Checklist

- Payslips
- Tax returns
- Self-employed accounts
- Benefits information
- Bonus information
- Dividend statements

## Property Checklist

- Property valuations (UK and overseas)
- Mortgage statements
- Buy-to-let information
- Equity calculations

## Savings & Investments

- Bank accounts
- ISA statements
- Premium Bonds
- Investment portfolios
- Cryptocurrency holdings

## Pension Information

- State pension forecast
- Workplace pensions
- Private pensions
- Recent pension valuations

## Business Interests

- Company accounts
- Shareholdings
- Partnership agreements
- Business valuations

## Debts & Liabilities

- Credit cards
- Loans
- Tax liabilities
- Personal guarantees