

# BLUE OCEAN

## FINANCIAL PLANNING

ESTABLISHED SINCE 1995

Financial Consultation Checklist	Client 1 <input checked="" type="checkbox"/>	Client 2 <input checked="" type="checkbox"/>
Passport/Driving Licence		
Utility bill (within last 3 months & not a mobile phone bill)		
Latest 3 months bank statements		
Latest 3 months payslips		
Latest P60		
Accounts for last 3 years if self employed		
Pension schedules		
Company pension scheme details		
Investment Schedules		
Insurance schedules		
Savings Account Statement		
Details of credit cards or loans		
Completed Fact Find		