Checklist “Financial Planning”

Please fill in the personal information and send (Gorslaan 12, 1441 RG PURMEREND) or mail (raymond.slotboom@finconcept.nl) this along with the necessary documents

Finconcept

GESPECIALISEERD IN PERSOONLIJKE FINANCIËLE PLANNING

Personal information

	Cliënt	Partner
Name		
Nationality		
Date of birth		
BSN		
Telephone number		
Email		
30% ruling?	Yes / No	Yes / No
Marital status	Married / Living together / Single / Divorced / Widow(er)	
Children	Name	Date of birth

Documents:

- Copy of your ID
- Recent salary slip (at least 2 periods)
- Recent Annual statement (2 years)
- Recent Tax Return
- Pension: pension growth (factor A) / last UPO (= Uniform Pension Overview) / overview www.mijnpensioenoverzicht.nl / pension abroad
- Recent WOZ – value of own place. Also economic value
- Overview mortgage and period of rate fixation
- Overall savings and investment accounts (also abroad)
- Value of other property / Loans
- Overview of risk- saving insurance and bank products
- Copy of Will / Testament
- Copy of Prenuptial Agreement / Co-habitation agreement
- Divorce agreement
- Expected donations or inheritance