

Mortgage broker – Insurance checklist



In order for us to make the appropriate insurance recommendations we need you to prepare the following financial documents for our client fact find and insurance quote.

Knowing all of the facts about your clients financial situation helps us ensure the introduction process is seamless.

Please prepare the below documents:

- Signed Information Release form
- Driver license
- Current pay slips
- Tax file number
- Current occupation and title for their employment
- Name and age of any financial dependents
- Most recent superannuation fund statements
- Details of current assets and liabilities

This list is not exhaustive. If you have any other information you feel may be relevant.

Thank you for taking the time to put this information together as it will assist us greatly.

Delta Financial Group Pty Ltd
ABN 148 831 038

📞 02 9327 4338
📞 0438 334 334

📍 Edge Offices Level 1, 377 New South Head Rd, Double Bay NSW 2028
📍 NAB House Level 15, 255 George Street, Sydney NSW 2000

enquiries@deltafinancial.com.au
www.deltafinancialgroup.com.au

Delta Financial Group Pty Ltd Corporate
Authorised Rep of GWM Adviser Services
Ltd AFSL no. 230692

We specialise in helping clients create an income for life.

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