



Initial Interview Required Information

It would be very helpful if you could bring the following details for our initial interview.

Income, Assets and Liabilities

- Current Payslips
- Current Centrelink Benefits (if applicable)
- A statement of assets and liabilities including estimated value and actual amounts due
- Bank account statements showing current amounts
- Loan statements showing current borrowings and interest rates
- Current investment holdings. For example, share statements, rental property statements etc.

Superannuation

- Current superannuation holdings including date of commencement of service
- Any other superannuation holdings with other funds

Wealth Protection

- Current statements for existing life, total & permanent disability, trauma or income protection insurance(s)
- Current Private Health Fund arrangements, if any, including premiums paid

Estate Planning

- Name of solicitor and if you have current will(s) in place, Powers of Attorney and Testamentary Trusts

Goals and Objectives

- Your investment goals and objectives, such as:
 - Reducing taxation liabilities
 - Money to retire (income required in retirement)
 - Control over your money
 - Flexibility within the portfolio to be able to change if needs change
 - Ability to save money for specific purposes
 - Protection for income and assets
 - Security for your future
 - Maximising Centrelink benefits
 - Understanding your investments
 - Lending for residential or investment purposes
 - Salary packaging
 - Other specific needs

Identification Requirements

- Current Proof of Identification. For example, passports, drivers licence and Medicare card

Miscellaneous

- Any other statements you wish for us to discuss

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