

# Initial Interview Required Information

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

- Children's DOBs
- Current superannuation statements including, date of commencement of service
- Any other superannuation holdings with other funds
- Current Private Health Fund arrangements, if any, including premiums paid
- Name of Solicitor and if you have current will(s) in place, including any Powers of Attorney or Testamentary Trusts
- Your investment goals and objectives, such as:
  - Reducing taxation liabilities
  - Money to retire
  - 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
  - Other specific needs
- Any current Centrelink benefits
- A statement of assets and liabilities
- Current statements for any existing life insurance, total & permanent disability insurance, trauma insurance or income protection insurance.

## Specialised Business Solutions

