REQUIRED*
FINANCIAL SERVICES PTY LTD
Wealth | Protection | Advice

FINANCIAL SUCCESS BEGINS WITH A PLAN

For over 35 years, Required has been trusted with the financial well-being of thousands of Australians.

Our dedication includes a customised financial plan incorporating and providing expert guidance to enable individuals to reach their goals.

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DEAR CLIENT,

When you work with people on their finances long enough, you learn that money is rarely just about numbers.

Over the past 35 years, I've sat with clients through market booms and downturns, business growth and business exits, family milestones, retirements, and difficult transitions. What becomes clear very quickly is that good advice is not about reacting to headlines or chasing opportunity — it's about judgement, discipline, and perspective over time.

Required was founded in 1991 with a simple belief: people deserve advice that is thoughtful, considered, and anchored in their long-term interests. That belief has guided every stage of our growth and continues to shape the way our team works today.

The financial lives of our clients are increasingly complex. Structures evolve, responsibilities grow, and decisions carry long-term consequences for families and future generations. Our role is not to overwhelm clients with information, but to help them see clearly — to bring order, structure, and confidence to decisions that matter.

I am proud of the fact that many of our client relationships span decades, and in some cases, generations. That longevity doesn't come from clever strategies alone. It comes from trust built slowly, advice delivered with integrity, and a commitment to act with care — especially when circumstances are uncertain.

At Required, we don't believe in shortcuts. We believe in doing the work properly, paying attention to detail, and standing beside our clients for the long term. That approach has served our clients well through changing markets and changing lives, and it remains the foundation of everything we do.

Beyond advice, Required is deeply committed to responsible stewardship — within our client relationships and our broader community. Supporting charitable initiatives and community organisations is an extension of our values and reflects our belief that success carries a responsibility to make a meaningful difference.

As we mark more than three decades of advice excellence, I am immensely proud of the trust our clients place in us, the dedication of our team, and the enduring relationships we have built across generations.

We look forward to continuing that journey with you.

Anthony D'Alessandro

AFP®, SMSF Specialist Advisor™
Founder | CEO
Required Financial Services

ABOUT US

For more than 35 years, Required has been entrusted with the financial wellbeing of Australians seeking clarity, confidence, and long-term direction.

Founded in 1991 by Anthony D'Alessandro, the firm was built on enduring family values — to care for clients as family, to act with integrity, and to provide guidance with discipline and accountability. Those principles continue to define our culture and our client relationships today.

We operate with a Family Office philosophy, providing strategic oversight, coordinated advice, and long-term stewardship for high-net-worth individuals and families with complex financial needs.

Every strategy we design is highly personalised — reflecting your financial objectives, family dynamics, and long-term aspirations.

OUR VALUES

INTEGRITY ABOVE ALL
Transparent, independent, accountable advice.

STRATEGIC CLARITY
Structure and insight for complex financial lives.

DISCRETION & TRUST
Confidentiality and professionalism at every step.

PARTNERSHIP
Enduring relationships that evolve with wealth and family.

EXCELLENCE IN EXECUTION
Precision, attention to detail, proactive oversight.

STEWARDSHIP & LEGACY
Protecting, growing, and transitioning wealth with purpose.

WHY CHOOSE REQUIRED?

WEALTH – BUILD WITH PURPOSE

We deliver disciplined, strategic planning and investment oversight designed to grow your assets, generate sustainable returns, and create long-term financial security.

Every decision is guided by clarity and insight, ensuring your wealth is structured to endure across generations.

PROTECTION – SAFEGUARD WHAT MATTERS

We provide comprehensive risk management solutions that protect your family, lifestyle, and legacy.

From life insurance and income protection to retirement planning and education funding, our strategies provide confidence and security at every stage of life.

ADVICE – CLARITY, STRATEGY, INDEPENDENCE

We simplify complex financial decisions and provide guidance across every facet of wealth.

Every recommendation is rooted in your long-term objectives, supported by rigorous analysis, and delivered with independence and discretion.

We collaborate seamlessly with your accountants, lawyers, and family office professionals to ensure cohesive, well-governed solutions.

OUR SERVICES

At Required, we provide a comprehensive advisory framework designed to build, protect, and transition wealth with clarity, discipline, and purpose.

WEALTH STRUCTURING & MANAGEMENT

- Strategic superannuation and retirement planning
- Investment portfolio construction and diversification
- Wealth accumulation and financial goal setting
- SMSF setup, management, and borrowing strategies
- Sophisticated investor solutions and wholesale-only opportunities

PROTECTION & RISK MANAGEMENT

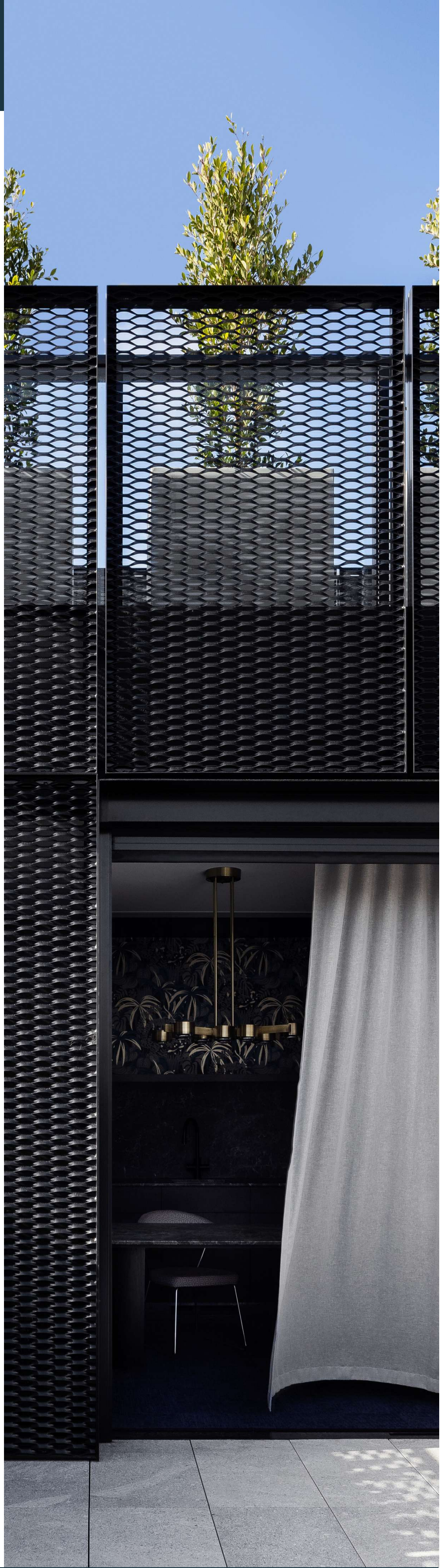
- We safeguard your family, lifestyle, and assets through disciplined risk oversight and insurance strategies:
- Life, Total & Permanent Disablement (TPD), Trauma, and Income Protection insurance
- Asset protection frameworks and risk mitigation strategies
- Estate planning and succession coordination

STRATEGIC ADVICE & OVERSIGHT

We simplify complex financial decisions and provide clarity across every facet of your wealth:

- Evidence-based investment strategy and portfolio oversight
- Intergenerational wealth transfer and governance frameworks
- Scenario modelling, forecasting, and long-term financial roadmaps
- Collaboration with accountants, lawyers, and family office professionals
- Access to private equity, private credit, venture opportunities, and bespoke investments

NOTE: Financial Planning Advice is by Required Financial Services Pty Ltd in its capacity as a Corporate Authorised Representatives of ASVW Financial Services Pty Ltd, ABN 27 007 261 083, AFSL No. 446176. Our qualified financial planners are Authorised Representative of ASVW Financial Services Pty Ltd, ABN 27 007 261 083, AFSL No. 446176.



LEADERSHIP

The leadership team brings a distinguished depth of experience, with a proven track record in managing significant client wealth and delivering thoughtful, long-term outcomes across generations.

ANTHONY D’ALESSANDRO

Founder & CEO | AFP®, SMSF Specialist Advisor™

Senior Financial Planner - Authorised Representative of ASVW Financial Services Pty Ltd (AR: 223011)

Anthony D'Alessandro is a seasoned professional in the financial services industry with over three decades of expertise.

His career commenced in 1991 as a Mortgage Broker, evolving into a Financial Adviser role by 1995. Anthony and his team have successfully funded over $1.5 billion in settled mortgages throughout his career.

He manages an existing client base of approximately 250 clients with over $400 million of Funds under Advice.

With extensive experience in portfolio management, client relationships, lending and development funding, Anthony brings a multifaceted skill set to the business. An SMSF specialist advisor with strong business management and operation capabilities.

CHRISTOPHER DÉSIRÉ

Associate Director | CFP® , SMSF Specialist Advisor™

Authorised Representative of ASVW Financial Services Pty Ltd (AR: 223011)

Christopher has been with Required since 2011, specialising in SMSF strategic advice, including Limited Recourse Borrowing Arrangements, pensions, contribution strategies, and broader financial plan development. He also leads investment markets research and provides technical support across the advisory team.

Christopher holds a Bachelor of Economics & Finance (RMIT University), Certified Financial Planner and the SMSF Association Specialist Advisor™ designation. His focus is on delivering superior client experiences, applying disciplined investment strategies, and constructing comprehensive plans tailored to each client’s objectives.

“My goal is to provide flexibility and confidence through sound financial strategy, making a meaningful difference in clients’ lives.”

CLIENT ADVISORY JOURNEY

Welcome to our Client Advisory Journey, where a family-office approach meets bespoke guidance, helping you preserve and grow wealth across generations.

01 INITIAL CONSULTATION

A complimentary meeting focused on understanding your personal and financial position, priorities, and long-term objectives. This discussion allows your adviser to define the scope and complexity of advice and outline associated fees. Personalised advice is not typically provided at this stage.

02 STRATEGY DEVELOPMENT

With your approval, your adviser conducts detailed analysis to develop a bespoke Statement of Advice (SOA), outlining a clear, strategic pathway to support your financial wellbeing and long-term objectives.

03 PRESENTATION OF YOUR PLAN

Your adviser will guide you through your Statement of Advice, ensuring you clearly understand each recommendation, its alignment with your objectives, and the steps required to proceed.

04 IMPLEMENTATION

With your approval, your adviser will implement the agreed strategy, keeping you informed throughout to ensure clarity and confidence as your plan is put into action.

05 REVIEW SERVICE

Your selected RFS Service Agreement includes periodic reviews designed to keep your goals, strategy, and portfolio working in sync. These reviews provide the insight and flexibility needed to optimise portfolio construction and pursue robust, long-term performance.

WHAT OUR CLIENTS SAY

A reflection of our commitment to excellence and long-term partnership.

★★★★★

"The relationship with financial advisors is a special one. While you certainly don't need to be best friends, it is important that they get to know you. I cannot speak highly enough of his care, concern and most importantly, pro-active strategic advice in the most difficult of circumstances. I would highly recommend Anthony, Christopher and the whole Required Financial Services Team".

R. Nixon | Dermatologist, Associate Professor | 20 year client

★★★★★

"Over the last few years, the team at Required have demonstrated to us and our clients that they not only have the technical knowledge and experience, but also the passion and commitment to assist our clients".

A. Trihas | Vantage Tax and Business Advices | 10 year client

★★★★★

"Anthony provided me with excellent advice, help and assistance. Over the last 25 years my company has grown and Anthony has continued to provide ongoing support and assistance not only to the company, but also long term superannuation and financial planning for me as I head towards retirement age. I have recommended Required Financial Services to my children and they have also received the same high class service from Anthony¨.

T. Old | Enviromental Services | 25 year client

★★★★★

"Required have always been generous with their time and their efforts to support me with all aspects of my financial regards. Anthony is a strong leader in business and his personal life and every time we get to chat, his love of his family is always paramount, and this is also reflected in the way he deals me as a client but most importantly, as a friend".

M. Glenister | Retiree | 20 year client

To read more: https://share.google/OtYT49KiFXZv8qO3X

COMMUNITY IMPACT

Through support of community sport, homelessness initiatives, and the Children's Cancer Charity, we foster opportunity, resilience, and lasting positive impact.

Ryan Wood

Walkinshaw TWG Racing

Required is proud to support Ryan Wood, for over 5 years, whose journey from Wellington to the Supercars Championship with Walkinshaw Andretti United embodies the same discipline, perseverance, and steadfast vision that guide our own approach—championing ambition with thoughtful support to transform dedication into lasting achievement.

FATHER BOB'S FOUNDATION

DONATE NOW

Required is honored to support Father Bob's Foundation, for over 15 years, a Melbourne-based charity dedicated to providing food relief, fostering social inclusion, and offering educational support. By empowering those in need with compassion and practical assistance, their work resonates with our belief in responsible stewardship and making a tangible difference in the lives of others.

my room

CHILDREN'S CANCER CHARITY

Required is privileged to support My Room Children's Cancer Charity, contributing to their vital work in caring for children and families affected by cancer. Their dedication to providing comfort, resources, and hope aligns with our own commitment to making a meaningful, lasting difference in the lives of those who need it most.

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MARKING 35 YEARS OF ADVICE EXCELLENCE, SERVICE, AND ACHIEVEMENT

ASVW FINANCIAL SERVICES

SMSF Association – Self Managed Super Fund Association

faaa – FINANCIAL ADVICE ASSOCIATION AUSTRALIA

AUSTRALIAN PRIVATE MORTGAGES CAPITAL GROUP – Investing Solutions Made Easy

Contact us for a complimentary consultation, and let us explore how these strategies can help you achieve your financial goals with confidence and clarity.

info@required.com.au

03 9695 5600

101 Victoria Ave, Albert Park VIC 3206

www.required.com.au

@requiredfinancialservices