



Financial success begins with a plan

Entrusted for 30 years with the financial well-being of thousands of successful Australians, Required has ensured that all of them enjoy the happy and prosperous future that they deserve.

About Us

In 1991 Anthony D'Alessandro established Required Financial Services based on his Italian family values: to look after people like family and to help them with care and integrity to best manage their finances. These virtues have become the heart and soul of the company.

Each member of our team has considerable years of experience and expert knowledge in many areas of financial services, and all uphold the Required tradition of building a personal relationship based on trust and availability.

Our Values

Anthony believes that those who work hard should be rewarded with the best in life. Required strives hard to make sure that every one of our clients reaches or exceeds their goals. 30 years on, those values are even stronger, with the Required family now ten people strong going out of their way to make sure that more than 250 clients can receive the best financial advice and meet their goals and thrive.



"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 and where you are at.

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 and the whole Required Financial Services Team".

*-Rosemary Nixon
Medical Practitioner*



Our mission

The Required team is skilled and dedicated towards achieving one aim: To help you reach your financial goals. We take the time and care to get to know you, your needs, and your goals. We tailor a plan to ensure your needs and goals are implemented with accountability.



Our Team

ANTHONY D'ALESSANDRO	Director and Founder
CHRISTOPHER DÉSIÉ	Associate Director- Advisor SMSF
ROSS PALMINGTON	Mortgage Administration Manager
LINO PELACCIA	Executive Director - Head of Sales
KRYSTAL WOODS	Client Services Manager
LISA MUNRO	Senior Paraplanner
HENDRIX NI	Client Services Officer
SELENA KHOO	Mortgage Administration Assistant
NATALIA TOBON	Marketing Coordinator
PRADEEP MAHENDRAN	Client Administration





WEALTH

PROTECTION

ADVICE

"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".

*- Danny D'Astolto
Partner- Vantage Tax & Business
Services.*

We build your WEALTH. Our financial planning and investment options will help build passive income and long-term wealth. Put your money to work for you and build your wealth passively.

We PROTECT your assets. Give you and your family peace of mind with life insurance and income protection plans to weather any setback. We will help you set up an education plan to ensure your children's future and a savings and retirement plan for yourselves.

Solid financial ADVICE. We guide your situation on the best pathway towards accomplishing your financial goals, which may include: Self-Managed Superannuation Fund, Insurance Advice, Pension Advice, Cash Flow Planning, Mortgage, Loan Advice, along with other financial planning advice needs.

Our services

We offer tailor-made financial planning, borrowing, investment, and superannuation advice with our expertise in:

- Property Finance
- Financial Planning & Advice*
- Superannuation Advice*
- Retirement Planning*
- Life Insurance*
- Wealth Creation & Management*

*NOTE: The services marked * and all 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*

Mortgages

When you are considering finance whether it be for your first home, an investment property or to restructure your existing finance, you need to align yourself with a professional and friendly company who will assist you to meet your goals.



At Required Finance, we pride ourselves in obtaining the best loan package to suit your needs. We can assist with Home Loans, Investment Loans, Commercial Loans, and Development Funding.

Flexible mortgage lending is available to all borrowers. Required Finance has at its disposal a network of lenders including mainstream banks, second-tier lenders, mortgage-based securities lenders, and private lenders. This allows us to offer a diverse range of finance packages at competitive pricing.



Required Finance has been a National Mortgage Brokers (NMB) member for 15 years. NMB is a national aggregator which provides its broker's business partners the opportunity to share access to a broad panel of lenders.

The benefits of this arrangement are access to more lenders and therefore more products, and the ability to meet the broad variety of client needs.

Residential and commercial property loans and refinancing through our affiliation with Required Finance who is a member and Corporate Credit representative no. 420133 of National Mortgage Brokers Pty Ltd Australian Credit License no. 391209.



Financial Planning

Whether you are looking for the best way to save for retirement, advice on how to plan, or insurance for you or your business, we can help you to find an appropriate product for your circumstances.

We can help you make informed decisions about the financial choices you'll want to make now and in the future.

Required Financial Services is a leader in its field, providing excellent investment and superannuation advice to people of all walks of life.

"Anthony provided me with excellent advice, help and assistance. Over the last 20 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".

*- Mr. Terry Old
Managing Director Kernow
Environmental Services PL*



"Compound interest is the 8th wonder of the world". Albert Einstein

At Required Financial Services, we offer strategic advice on all your investment and superannuation needs including:

- SMSF Limited Recourse Borrowing Arrangement
- SMSF Strategies
- Wealth creation & accumulation
- Retirement planning, annuities, allocated pensions
- Managed investments
- Tax investment strategies
- Investments
- Rollover & redundancy
- Salary sacrifice planning
- Centrelink Modelling
- Estate planning
- Margin Lending Advice
- Personal, corporate, or employer-sponsored superannuation

Our qualified financial planners are Authorised Representative of ASVW Financial Services Pty Ltd, ABN 27 007 261 083, AFSL No. 446176.





Insurance Advice

To protect the wealth you create we can help you with Life, Total and Permanent Disablement (TPD), Trauma, Income Protection Insurances.

At Required Financial Services, our aim is to assist you in making informed insurance choices when it comes to protecting what's important to you, your family, and your business.

Self-Managed Super Funds (SMSF)

SMSFs allow members to have additional control over their superannuation, additional flexibility, and further investment options.

SMSFs can invest in a significantly wider range of investments (including property – and the possibility of borrowing to acquire property).

SMSFs can also be used as an effective Estate Planning tool.

"The Required team at Required have been professional, prompt & always willing to assist me, even after the loans have been completed. I know that with one phone call I can speak to someone at Required immediately and have any issues attended to.

I have referred them to many family and friends and the feedback I get is terrific. Thanks guys and keep up the good work".

*- Mr. Andrew Roussou
Managing Director LED Autolamps
Trading Ltd.*

What are the advantages of establishing an SMSF?

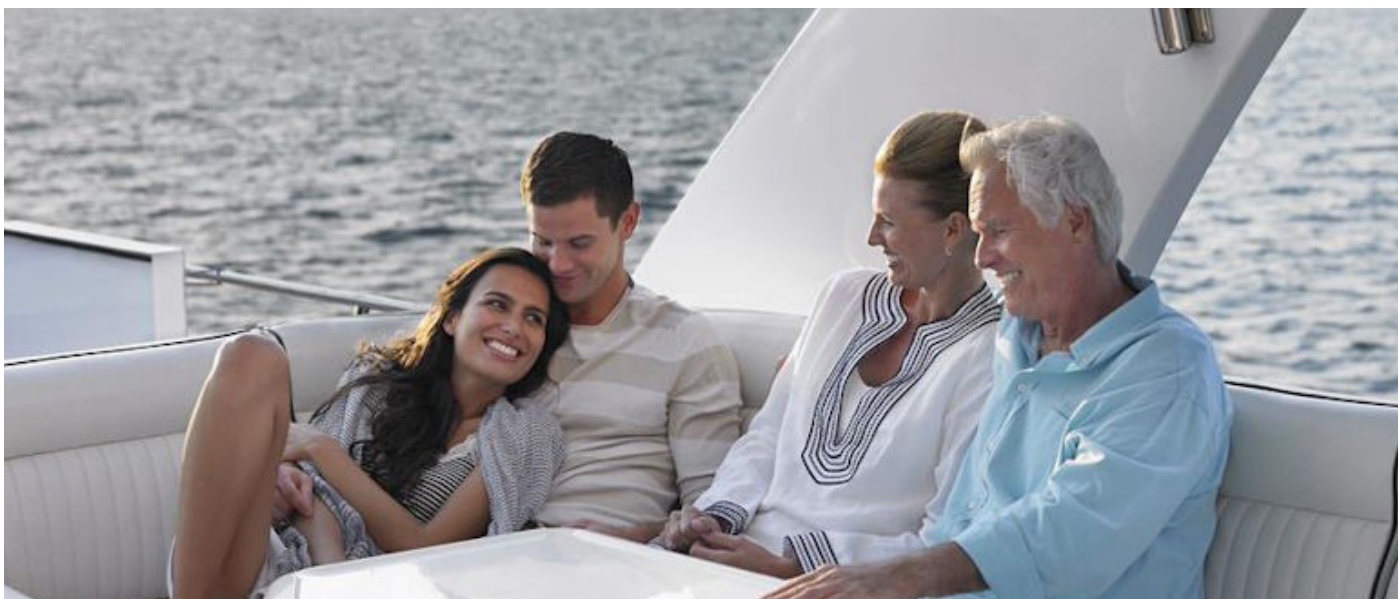
For many people, the greatest advantage of an SMSF is greater control, flexibility, and the investment choice they provide. Through an SMSF you have:

- Greater control over the investment strategy for the fund.
- A wider range of investment options such as direct property, small businesses, and even art.
- An SMSF can be tailored to meet your own personal circumstances in relation to estate planning.
- The ability to borrow via the SMSF to purchase an allowable asset.
- Member superannuation accounts can be taxed at a member level rather than at a fund level, compared to many retail master trusts and industry superannuation funds.

SMSF Strategic Advice

We offer you a comprehensive range of structured advice in the SMSF area including:

- SMSF Set-up advice
- SMSF Insurance strategies
- SMSF Borrowing strategies
- SMSF Pension planning
- Transition to retirement adviser





"Always believe in your ability and in your goals, this is the only way you will be able to reach them."

Mohamed Salah - LFC Soccer Star

Required is celebrating 30 years of business excellence!

Please contact us on [03 9695 5600](tel:0396955600) for a complimentary, obligation-free consultation to assess how some of these strategies can help you with your financial goals.

Memberships

Required Group of companies are a proud member of the follow industry bodies:



FINANCIAL PLANNING
ASSOCIATION of AUSTRALIA



Self Managed
Super Fund
Association



National Mortgage Brokers
Supporting brokers for 20 years



WEALTH - PROTECTION - ADVICE

REQUIRED