

Getting to know you

We see this first meeting as an important step in getting to know you and to understand how we can work together. It should last between 1 and 2 hours, during which time, we will discuss your current situation and your goals and objectives. We'll introduce our business, how we operate and what we do. We'll also explore some of the general strategies that may be of benefit to you and that you may need to consider in achieving your goals.

If you feel comfortable with us and our approach, we can agree to proceed to the next stage. Please note that all fees and charges will be outlined to you prior to the commencement of any personalised advice services.

Before our meeting

To ensure you are prepared and get the most from our time together, we ask that you take some time to consider your position and your goals before we meet. We may also send you a link to use our new secure on-line Wealth Report tool to document your position and help you gain important insights.

What to bring

To make productive use of our meeting together, it would be beneficial if you could bring along any documents that may be relevant to your financial situation. These documents may include the following:

- Bank Account/ Investment Statements, Shareholding Certificates
- Your most recent Superannuation, Pension and Annuity statements
- Your most recent payslip
- Details on your current debt including interest rates and repayments.
- Your most recent Centrelink/DVA statements or payments
- Personal insurance statements.
- Most recent income tax return and your tax file number
- Details about any entities you use including trust deeds (e.g. Family Trust, Self-Managed Super Fund).
- Your driver's licence OR Australian passport OR State Government issued photo card.
- Other relevant documentation

If you are unsure, please bring it anyway. Too much information is far better than too little!

Should you have any questions in relation to our meeting, what to bring, or the report, please feel free to contact us on 3217 6044.

We look forward to seeing you soon.

Yours sincerely,

The Team at Trestle Planning

Security*

Your information remains confidential and is secured using the same encryption and physical security that banks use to protect your private details. We are unable to view your personal information unless you select the option to allow me to view your personal data.

All information entered into the Wealth Report online tool is confidential and secured by the owner of the site, IOOF Holdings Ltd, ABN 13 167 149 831. Data is encrypted and has multi-factor authentication as additional layers of protection. We are unable to view your personal information unless you select the option within the site to allow one of our qualified advisers to view your data and contact you to discuss the outcomes.