

Wealth
Protection
Advice



REQUIRED *
FINANCIAL SERVICES PTY LTD

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
bright 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 help them with care and integrity to manage their finances effectively. These values have become the heart and soul of the company.

Each team member has considerable years of experience and expertise 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's unwavering belief in hard work and deserving rewards has been the cornerstone of Required Financial Services for the past 30 years. Our dedicated team, now ten members strong, goes above and beyond to ensure that over 250 clients receive top-tier financial advice.

We are committed to helping clients surpass their goals, thrive, and secure a prosperous future.



"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

At Required Financial Services, our skilled and dedicated team shares a singular aim: to assist you in reaching your financial goals. We invest the time and care necessary to understand you, your unique needs, and your aspirations. Our approach is personalised, ensuring that your financial requirements and objectives are met with accountability. Whether it's financial planning, investment strategies, or tailored solutions, we are committed to your financial success.



Our Team

ANTHONY D'ALESSANDRO	Founder and CEO
CHRISTOPHER DÉsirÉ	Associate Director - Advisor SMSF
ROSS PALMINGTON	Mortgage Administration Manager
LINO PELACCIA	Executive Director - Head of Sales
KRYSTAL WOODS	Client Services Officer
FAITH KATRINA ABUCAY	Financial Planning Assistant
HENDRIX NI	Paraplanner
SELENA KHOO	Head of Investor Relations
NATALIA D'ALESSANDRO	Head of Marketing

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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 advice will help generate passive income and build long-term wealth.

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 you 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.

Stats and Facts:

- *Facts Funds Under Management \$320 Million*
- *Mortgages Under Management \$400 million*

Our services

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

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

*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 it comes to financial matters, whether you are purchasing your first home, investing in property, or restructuring existing finances, alignment with a professional and friendly company is crucial.

At Required Financial Services, we embody these qualities, offering personalized guidance to help you achieve your goals. Our commitment is to your financial success, and we're here to support you every step of the way.



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.

With over 30 years of specialised expertise in lending, we've facilitated over \$1.4 billion in lending transactions. Our unwavering commitment to customer focus and extensive industry connections empowers us to offer innovative solutions tailored to your unique needs. Whether securing your first home, investing in property, or restructuring existing finances, Required Financial Services is here to guide you toward financial success.



Required Financial Services and Xplor Finance Pty Ltd

Required Financial Services and Xplor Finance Pty Ltd have united their strengths to offer our clients optimal mortgage solutions. The Xplor team boasts extensive expertise across all facets of mortgage lending and has over a decade of experience in the finance and mortgage broking industry.

XplorFin Pty Ltd T/A Xplor Finance is a corporate representative (543072) of Buyers Choice Licencing Pty Ltd (Australian Credit Licence 509484).

Financial Planning

At Required Financial Services, we understand that financial planning is more than just numbers— it is about crafting a secure future. Whether you seek the best retirement savings strategy, guidance on financial planning, or insurance solutions for yourself or your business, we're here to assist.

Our expertise allows us to help you make informed decisions about your financial choices, both today and in the future. As a leader in our field, we specialise in providing investment and superannuation advice to individuals from 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*

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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 your wealth, 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 decisions when it comes to protecting what is important to you, your family, and your business.

Self-Managed Super Funds (SMSF)

Self-Managed Super Funds (SMSFs) empower members with greater control over their superannuation, enhanced flexibility, and expanded investment choices.

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.

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

"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.*





Motor Racing Sponsorship - Ryan Woods

Super V8'S Walkinshaw
Andretti United's

*Supporting
Championing
Diligence,
Empowering
Decisions,
Nurturing
Aspirations, and
Upholding
Perseverance*

Basketball Sponsorship - Nunawading Spectres



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Giving Back Sponsorship - Fr Bob Maguire Foundation

**(Business community support.
Proudly supporting for over 8
years)**

*Wholehearted
Commitment and
Firm Confidence in
Collective
Possibilities*

Long Term Sponsorship - World Vision



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Let's build a roadmap to your financial success!

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

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Memberships

Required Group of companies are proud members of the following industry bodies:



FINANCIAL PLANNING
ASSOCIATION of AUSTRALIA



Self Managed
Super Fund
Association



National Mortgage Brokers
Supporting brokers for 20 years

ASVW
FINANCIAL SERVICES