Your first meeting
Preparation and checklist

Preparation

We look forward to meeting you and getting to know more about you, and what you are hoping to achieve.

Prior to our meeting, you may wish to get an understanding of our advice process by viewing this brief video from our founder, Julio Carrieri* https://www.capitolgroup.com.au/static/uploads/files/untitled-1-wfbgahfcxejl.mp4

Our first meeting should take about an hour and covers two main areas:

1. Financial circumstances

We would like to get an overview of your current investments and superannuation so it would be useful if you could bring any statements with you, or prepare a summary of your current financial situation, including your income, expenses, insurances, assets, loans, and any debts.

2. Goals, objectives and future achievements - Understanding you

Please consider giving some thought to what you are hoping to achieve, and the goals and objectives you have.

Some of the common goals that many of our clients discuss with us, or plan for, are:

- Retirement plans
- Advice with an inheritance
- Income you need to generate from your investments to maintain your lifestyle
- Establishing an investment portfolio
- Family home considerations
- Supporting family members (children and/or parents)

Documents checklist

- ❐ Photographic ID (e.g. Driver Licence or Passport)
- ❐ Recent Superannuation statements
- ❐ Recent Investment holding statements
- ❐ Curent Insurance statements
- ❐ Summary of your loans/debt
- ❐ Summary of your income and expenses

Finally, don't be too concerned if you don't have everything at hand for the initial meeting.

We look forward to meeting you.

**Julio is an authorised representative of Consultum Financial Advisers. He is employed by Latin Pacific Holdings Pty Ltd t/as Capital Group Wealth which is an Authorised Representative of Consultum Financial Advisers Pty Ltd ABN 65 006 373 995 AFSL 230323.*