



How to plan for your first meeting

Your very first meeting with a Financial Adviser may seem a bit daunting. However, here at Sage we will do everything we can to put you at ease and make this an informative and enjoyable process.

Here are our top tips on ensuring you are prepared for your initial consult so we can make the most effective use of time:

#1 Gather all your documentation. This should include your ID documents, insurance documents, share and investment details, super statements and details of your assets and liabilities. This may seem like a chore, but by having all these details up front, we can give you an accurate outline of your current financial position and project how much money you will have at retirement and more importantly, how long your money will last in retirement.

#2 Get to know us. You should browse our website and watch the Adviser intro video that was emailed through to you. Familiarity with your Adviser and understanding our offering will make you feel more confident and comfortable.

#3 Make a list of questions you would like covered in the consult. This could be how to consolidate your Super, how you can transition into retirement or setting up an Estate Plan.

#4 Think about your goals for retirement? How do you envision spending your retirement? Does this align with your partner's goals? Are you ready to retire now or do you have a fixed date in mind? Do you feel emotionally ready for retirement or are you just going with it because you have reached retirement age? These questions are just as (if not more) important for a successful retirement as financial security.

#5 Reach out. If you have any concerns or questions prior to your consult, do not hesitate to reach out. We will be happy to help.

What do you want out of retirement?