

Financial View

Answer each question as if **MONEY WERE NO OBJECT**

0-10 (10=High) – or – NA = Not applicable

Answers	Questions
	Making my finances work more effectively for me
	Organised money that grows with time
	Reducing and eliminating debts
	Mortgage reduction and removal
	Being able to set aside more money
	An emergency fund
	Investment for children and family
	Saving short term
	A Holiday account
	A Clothes account
	Paying less tax
	Getting a discount on my household bills
	Cheaper use of plastic cards
	Protecting my family if I die prematurely
	Saving medium term 4-10 years
	Retiring early in life to pursue personal interests
	Starting a business
	Raising capital
	Planning financial Independence
	Investing a current lump sum with high interest
	School fees planning
	Protecting myself from disability and serious illness
	Buying a new/second property
	Realizing a special financial dream
	A system that allows me to spend with control

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