

Financial View

Answer each question as if **MONEY WERE NO OBJECT**
0-10 (10=High) – or – N/A = Not applicable

Questions	Answers
Making my finances work more effectively for me	
Organised money that grows with time	
Reducing and eliminating debts	
Mortgage reduction and removal	
Ensuring I am on track to retire with enough money to live and enjoy	
Paying off my house mortgage faster	
Investment for children and family	
Saving short term	
Investing in property to grow my wealth and generate extra income	
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 suitable returns	
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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