



please take a moment

YOUR NAME _____

	YES	NO	N/A
Are you happy with the amount of tax you are currently paying?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Would you say you have a good understanding of financial matters?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are you totally satisfied with your current level of income, assets and bank balance?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are you confident you will have funds available to live the retirement lifestyle that you currently imagine?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are you satisfied with your work/personal life balance and have enough quality time for family/friends/leisure?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are you comfortable with your current levels of debt?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are you satisfied you are getting maximum use out of every dollar you spend?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the need arose, do you have excess expenditure you could reduce?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you currently have a working budget?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If you didn't make it home tonight, have you provided enough certainty and simplicity in regard to financial future for those you care for and love?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Congratulations on taking this active step towards improving your financial security. We look forward to learning more about you and sharing ideas in our first meeting.

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