



Financial Health Check

Are you on track?



FINANCIAL ADVICE
MATTERS
Achieving your goals

Please take a few moments to complete the 10 questions below which will help you determine if you are currently on track towards *Achieving Your Goals*.

(PLEASE CIRCLE YOUR ANSWER)

How comfortable are you in understanding what your total financial situation looks like right now?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How comfortable are you in knowing you will achieve your short, medium and long term goals?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How confident are you in managing your tax effectively?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How comfortable are you in your ability to budget and manage your money?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How confident are you in knowing that your super will provide you with the lifestyle you want in retirement?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How confident are you that your family will still be on track to achieve your family's goals if you had a serious accident, illness or passed away?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

Are you comfortable that your estate planning (wills, Powers of Attorney) needs are in place and up to date?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

Are you comfortable in your ability to cope with the stress and worry caused by money problems that may arise?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

Are you comfortable in knowing which professionals to speak with to get help and advice for your financial and lifestyle needs?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable

How comfortable are you in being able to regularly review all of the above and know whether you're on track now, and where you are headed?

NOT Comfortable SOMEWHAT Comfortable VERY Comfortable



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