

Financial View

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

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

1. Making my finances work more effectively for me.
2. Organised money that grows with time.
3. Reducing & eliminating debts
4. Mortgage reduction and Removal
5. Being able to set aside more money
6. An emergency fund
7. Investment for children & family
8. Saving short term
9. A Holiday account
10. A Clothes account
11. Paying less tax
12. Getting a discount on my household bills
13. Cheaper use of plastic cards
14. Protecting my family if I die prematurely
15. Saving medium term 4-10 years
16. Retiring early in life to pursue personal interests
17. Starting a business
18. Raising capital
19. Planning financial Independence
20. Investing a current lump sum with high interest
21. School fees planning
22. Protecting myself from disability
23. Buying a new/second property
24. Realising a special financial dream
25. A system that allows me to spend with control