

# Financial Success Gap Analysis



I pride myself in providing the best service and advice in managing your financial world and helping you achieve financial success. To help you understand where you might need the most help, I've developed this questionnaire to help you reflect on where you're at in your financial journey.

Please read each question and complete the boxes under "Where I am now" and "Where I would like to be" with what you would rate yourself. A description of the number rating is with each question. Please tick what you feel is appropriate for yourself in "Priority for fixing this"

| Rate Yourself  | Where I am now<br>(please write the number)   | Where I would like to be<br>(please write the number)   |
|--|---|---|
| 1. How would you rate your overall financial organisation right now?   | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     Completely disorganised ← 1 2 3 4 5 6 7 8 9 10 → Totally organised                 </div> | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     ← 1 2 3 4 5 6 7 8 9 10 → High level of certainty                 </div> |
| <b>Priority for fixing this:</b><br><input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority |   |   |
| 2. How confident are you that you know how much you will need (assets and income) for a long, comfortable stress free retirement?                | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     We don't have ← 1 2 3 4 5 6 7 8 9 10 → High level of certainty                 </div>     | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>       |
| <b>Priority for fixing this:</b><br><input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority |   |   |
| 3. How confident are you that you are on track to build the assets you will need for a long, comfortable stress free retirement?                 | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     Not confident ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>           | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>       |
| <b>Priority for fixing this:</b><br><input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority |   |   |
| 4. How confident are you that you are taking advantage of all the opportunities to legally minimise your taxes?                                  | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     Not confident ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>           | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>       |
| <b>Priority for fixing this:</b><br><input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority |   |   |
| Rate Yourself  | Where I am now<br>(please write the number)   | Where I would like to be<br>(please write the number)   |
| 5. How confident are you that your family would have enough income and assets in the event of your death or disability?                          | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     Not confident ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>           | <div style="text-align: center;"> <input style="width: 50px; height: 25px; border: 1px solid black;" type="text"/><br/>                     ← 1 2 3 4 5 6 7 8 9 10 → Totally confident                 </div>       |
| <b>Priority for fixing this:</b><br><input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority |   |   |

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|   |   |
|---|---|
| <p>6. How confident are you that you know exactly what would happen to your assets, liabilities and super in the event of your death?</p>   | <div style="text-align: center;"> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> <span style="margin: 0 20px;">→</span> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> </div> <p style="text-align: center;"> <b>Not confident at all</b> ←      1 2 3 4 5 6 7 8 9 10 →      <b>Totally confident</b> </p> <p style="text-align: center;"><b>Priority for fixing this:</b></p> <p style="text-align: center;"> <input type="checkbox"/> ASAP    <input type="checkbox"/> Next 3 months    <input type="checkbox"/> Not a priority         </p>                |
| <p>7. How involved (on a day to day level) do you want to be with the development of your financial plan and the selection of the appropriate investments, super, loans and insurance policies?</p> | <div style="text-align: center;"> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> <span style="margin: 0 20px;">→</span> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> </div> <p style="text-align: center;"> <b>Prefer to do everything ourselves</b> ←      1 2 3 4 5 6 7 8 9 10 →      <b>Prefer to outsource</b> </p> <p style="text-align: center;"><b>Priority for fixing this:</b></p> <p style="text-align: center;"> <input type="checkbox"/> ASAP    <input type="checkbox"/> Next 3 months    <input type="checkbox"/> Not a priority         </p> |
| <p>8. How confident are you that your loans are properly structured, tax effectively, with a clear plan to reduce bad debt?</p>   | <div style="text-align: center;"> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> <span style="margin: 0 20px;">→</span> <input style="width: 60px; height: 30px; border: 1px solid #ccc;" type="text"/> </div> <p style="text-align: center;"> <b>Not confident at all</b> ←      1 2 3 4 5 6 7 8 9 10 →      <b>Totally confident</b> </p> <p style="text-align: center;"><b>Priority for fixing this:</b></p> <p style="text-align: center;"> <input type="checkbox"/> ASAP    <input type="checkbox"/> Next 3 months    <input type="checkbox"/> Not a priority         </p>                |

*Thank you*