

What I want to do for the rest of my life

anne wray
independent financial adviser



One of our principal objectives is to help you achieve and maintain your desired lifestyle. A major element in this process is to try to ensure that the target lifestyle can be funded, preferably in a tax efficient way, and this involves a combination of tax planning, investment planning and cash flow management.

The starting point is to define your objectives and it would be very helpful if you could complete and return this questionnaire.

Objectives

1a) what do you want more of in your life?

1b) what do you want less of in your life?

2a) what are your current goals and objectives if any?

2b) what is your biggest fear about the future?

2c) what is your greatest hope for the future?

Family

3) What do you want to do with/for your partner?

4) What do you want to do with/for your children

5) What do you want to do with/for your grandchildren?

Home & Garden

6) Do you want to remain in your present home forever, even if you live to a great age?

Will the garden eventually be too much for you to look after?

7) If so what changes may become necessary?

8) If not when do you plan to move and to what/where?

9) Are there any improvements you would like to make to your present home?

Work

10) When do you want to 'ease off' and how would you define this?

11) When do you want to retire – and what issues will arise at that time?

Time Management & Delegation

12) Do you have sufficient time to do the things you want in life?

13) If not, what do you plan to do about it?

14) If you had 5 years to live, what would you do differently?

15) If you had 24 hours to live, what would you regret?

16) Where do you see yourself in 5 years?

17) What does your ideal life look like?

Study

18) Is there a course or additional qualifications you would like to gain?

Other Objectives

19) Please detail what they are and whether there are any financial implications that should be incorporated in your Financial Plan.

20) To whom do you want to leave your money?

21) What do you want to be remembered for?

Any Other Comments