Ten ways you’re unique

1. What are your big financial life goals, for yourself and your loved ones?
2. What’s your current income, from your work and any other sources, and how do you expect that to change in the future?
3. What are your regular living expenses, and how might they change in the future?

(Be sure to include your holidays and days out in here)

1. Note down your financial and material assets:
2. How would you view your wider family wealth?
3. What is your general attitude to investment risk (with cautious being very little risk and adventurous being a lot of risk)
* **Cautious**
* **Cautious to Moderate**
* **Moderate**
* **Moderate to Adventurous**
* **Adventurous**
1. What are your other personal assets, such as your knowledge, skills and strengths, which you could use to earn income in future years?
2. Do you have, or plan to have, children?
3. How would you class your overall health?
4. What experiences have you had in the past that may have affected your attitude and habits towards money? (e.g. were you ever out of work and learnt how to budget)