

What I want to do with the rest of my life: (as at _____)

One of our principal objectives is to help you achieve and thereafter maintain your desired lifestyle. A major element in this process is to try to ensure that your 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 would please complete the following questionnaire and provide a copy for us. Any financial implications can be defined and agreed at our meetings.

Please assume you may live to age 100.

Heading	Questions	Answers and Notes
Family	<ol style="list-style-type: none"> 1. What do you want to do with/for your Partner? 2. What do you want to do with/for your children? 3. What do you want to do with/for your grandchildren? 	
Home & Garden	<ol style="list-style-type: none"> 4. Do you want to remain in your present home for ever - even if you live to a great age? Please consider whether it and/or its garden may eventually be too much for you to look after. 5. If so, what changes may become necessary? 	

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	<p>6. If not, when do you plan to move - and to what?</p> <p>7. Are there any improvements you would like to make to your present home?</p>	
Work	<p>8. When do you want to 'ease off' - and how would you define this?</p> <p>9. When do you want to finally retire - and what issues will arise at that time?</p>	
Companionship and/or new friends	<p>10. Do you have any desires under this heading? If so, what and how do you plan to address them?</p>	
Time management and delegation	<p>11. Do you have sufficient time to do the things you want to do?</p> <p>12. If not, what do you plan to do about it?</p> <p>13. At what time do you normally get up in the mornings?</p> <p>14. If you would consider an earlier time what time would that be?</p>	

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	<p>15. When will you adopt it?</p> <p>16. Are there things you would consider delegating or out-sourcing?</p>	
Study	<p>17. Is there a course you would like to take or additional qualifications you would like to gain?</p>	
Personal fitness	<p>18. What objectives do you have in relation to weight loss or additional fitness and how do you intend to achieve them?</p>	
Hobbies and similar interests	<p>19. Do you have any objectives for hobbies or leisure activities?</p>	
Other objectives	<p>20. Please detail what they are and whether there are any financial implications that should be incorporated in your Financial Plan.</p>	

Your name(s) _____