

CHECKLIST

FINANCES



- ☐ Is the financial plan I have in place going to enable me to reach my goals
- ☐ My annual saving / spending goals are clear
- ☐ My plan incorporates appropriate levels of mortgages and other debt

INVESTMENTS



- ☐ I understand what superannuation is and how I can maximise it for my long-term financial gain
- ☐ I understand that investments chosen to reach my long-term goals may bring short term losses
- ☐ I have sufficient diversification in my portfolio for long term growth

INSURANCES



- ☐ If I were to become disabled today, my financial resources and/or disability insurance would be sufficient to meet my needs
- ☐ If I were to pass away, my financial resources and or life insurance would be sufficient to meet mine / family needs
- ☐ I have evaluated whether or not to purchase long term care insurances to meet mine/family needs in the event of a prolonged illness
- ☐ Do you currently have a will ?