Critical Issues Questionnaire

So that we can best help you, please spend **5 minutes** to fill out the **4 questions** below. This gives us some base information to begin to assess your needs and where we can add the most value and assist you in the best possible way to improve your financial success & lifestyle.

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| **▼** | Go ahead and write down the main **challenges** or **concerns** that you are facing (financially) today:   1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| **▼** | What about the main **opportunities** or **ideas** that you have in mind right now?   1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| **▼** | What **‘Life stage’** best suits your life at present? | |
|  | **🔾** | **‘Start Up’**: The idea of creating wealth sounds very appealing. Don’t have much in the way of investments but keen to commence a plan for the future. | |
| **🔾** | **‘Grow Richer’**: Looking at further wealth creation strategies including your own home. May have significant debt but still looking for growth alternatives. Protecting income, assets & family a big priority. | |
| **🔾** | **‘Achieve’**: Looking at using property & assets already accumulated to maximise wealth. Close to the peak of your career so now is the time to make the most of your income & assets. Need to consolidate position & secure your future. | |
| **🔾** | **‘Fine Tune’**: Affluent investors who are thinking about protecting assets already accumulated. Beginning to feel financially independent, it is an ideal time to leverage your assets & protect income to build up your nest egg. | |
| **🔾** | **‘Enjoy’**: Getting ready to live off the wealth you have accumulated. Your goal is to maximise income from investments, minimise taxation, maximise centrelink advantage & enjoy a quality lifestyle. | |
| **▼** | And lastly….how would you rate your **quality of life** – **sense of confidence** (financially), ability to get away, **satisfaction** from your work, income, fun, relationships, etc.? | |
|  | **🔾** | **Poor** - “This pretty much sucks; I’m working way too hard for little or no reward.” | |
| **🔾** | **Average** - “It’s alright but there are problems that I’m struggling with, hard to see the way forward.” | |
| **🔾** | **Good** - “I’m doing ok but there’s lots more options to be had here. I’d love some ideas or help….” | |
| **🔾** | **Great** - “Things are really good. I want to step it up a notch and look at more opportunities (every post a winner).” | |
| **🔾** | **Awesome** - “Our situation is very comfortable! It’s time for growth and for me to really improve & consolidate! Looking to maximize the ‘fruits of my labor…. | |