

TOOL 2.2.2: What to think about | Exploratory meeting client information pack

PURPOSE: Client preparation guide designed to assist the client's thinking around the key issues for discussion at the exploratory meeting, included in the 'exploratory meeting client information pack'.

**Client facing tool to be cut below the dotted line and embodied into personalised branded document*



WHAT TO THINK ABOUT PREPARATION GUIDE

The following questions are designed to help you prepare for our upcoming exploratory meeting.

Please answer the questions below as best you can. Keep in mind, this is all about you and the life you want to live. The more time you spend thinking about what you really want, the better chance we have of helping you make it happen.

YOUR LIFE TODAY

What are the things that you really enjoy about your life today?

What are the things you enjoy **least** about your life today

If you had a magic wand and could change anything about your current financial situation, what would that be?

EXPLORE

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WHAT'S IMPORTANT?

What's really important to you in your life today?

What's really important to you for your future?

What keeps you awake at night?

If you woke and your house was on fire, what 3 items would you save?

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What do you see are your biggest challenges/hurdles when it comes to your future life and financial success?

YOUR DREAMS

What are your future dreams and aspirations?

Do you have a plan to achieve your future dreams and aspirations?

It is a Tuesday at 10am 15 years from now, what are you doing?

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If you were financially secure right now, and did not need to work another day to earn an income, what would you do differently to what you are doing now?

ANYTHING ELSE?

Is there anything else you would like to discuss at our meeting?