**WHAT’S IMPORTANT INFORMATION FORM**

Name:

Date:

**General**

What is really important to you;

1. In your life today
2. In your life in the future

**Family**

What would you like to do to support your children or parents over the next 10 years?

**Lifestyle**

What does your ideal lifestyle look like over the next 10 years?

**Assets**

How important is home ownership to you?

What does your dream home look like over the next 10 years?

How important are things like cars, boats, holidays or a holiday house?

**Career/business**

What are your career/professional aspirations?

Would you like to own your own business at some time in the future?

**Retirement**

What is your ideal lifestyle in your retirement years?

What would you like to do to support your children in your retirement years?

What is your dream home in retirement years?

**Further information that’s really important**