

my money...gaining control & enjoying success

	yes	no	needs action
1. I am clear about my goals for the future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I know I will have sufficient wealth to enjoy my future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I am comfortable that I manage cash-flow efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I use a smart account to help build a cash surplus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I am in control of my debt levels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I know I am managing my debt in the most tax-effective manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I am balancing current lifestyle needs with future wealth needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I know I am managing my investments in the most tax-effective manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I know how current restrictions on super contributions will change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I am comfortable with my plans to maximise the new super rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. I have a will and powers of attorney up to date and in place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. I have appropriate insurance in place to protect me/family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>