



# The creation of true wealth

Dreams are the foundation of achieving true 'wealth'.



Client Name:

Date:

Financial Planner:

# Introduction

**We all seek it, but very few of us are fortunate enough to grasp the sense of ‘true wealth’. We are not referring so much to the amount of money you have, but to the achievement of true contentment with your life.**

A major stumbling block to achieving this is that our lives are very complex. For this reason we need to divide it into manageable sections, which make it possible for us to decide how we wish to live and what it is that we wish to accomplish in our lives.

We believe that to be happy you must have dreams. Success, however, generally requires a plan. It is with this in mind that we partner with you to develop, implement and monitor a plan to ensure your dreams become reality.

By answering these questions and then clarifying your thoughts into a single ‘life philosophy statement’ you will have made the all important start in your new life plan journey. We will look to incorporate the financial planning that is needed to allow you to reach your goals and realize your dreams.

In the simplest terms, our lives can be divided into five categories; financial, health, relationships, adventure and spiritual. While these are obviously interconnected, each one is distinct and should be considered separately.

## My life’s success rating:

First consider **how successful you believe you have been in managing each of these aspects of your life** by rating yourself on a scale of 1 to 5 (1 = poor, 5 excellent):

FINANCIAL	1	2	3	4	5
HEALTH	1	2	3	4	5
RELATIONSHIPS	1	2	3	4	5
ADVENTURE	1	2	3	4	5
SPIRITUAL	1	2	3	4	5

## Current situation & wish list

Please consider each of the following aspects of wealth, comment on your current situation and write down at least one wish for each. For example: My finances never seem to extend beyond just paying the bills. I wish my annual income was \$10,000 more before the end of the year so that I can afford a beach vacation. Be as specific and realistic as you can with your wish and include a deadline, which will make it a goal.

**FINANCIAL**



**HEALTH**



**RELATIONSHIPS**



**ADVENTURE**



**SPIRITUAL**



## Your short term vision

Imagine it is 10 years from today and you are looking back, what would have had to happen for you to feel happy with what you've accomplished?



What obstacles stand in your way of achieving success in the next 5 years?



# Life philosophy statement

Review your answers and write down a single statement that covers all 5 aspects of your life (financial, health, relationships, adventure and spiritual). This statement will be your blueprint for living your life. It is something that should remain on your mind and assist in your decisions as they relate to day to day living. This is something that will not and should not be easy to complete. It requires much thought and effort, so take your time. Your effort will be well worth it.

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