

The Strategic Money Plan™

My Mindset

My Money Values

Why is money important to me?

- 1.....
- 2.....
- 3.....

My Money Milestones

What direction do I want to go in?

- 1.....
- 2.....
- 3.....

My Priorities

What do I require, desire and aspire for?

- 1.....
- 2.....
- 3.....

My Money Plan

What actions am I going to take?

- 1.....
- 2.....
- 3.....

The Strategic Money Plan™

My Checklist

LEGAL

	YES	NO
Will	<input type="checkbox"/>	<input type="checkbox"/>
Death in service	<input type="checkbox"/>	<input type="checkbox"/>
Life policies in trust	<input type="checkbox"/>	<input type="checkbox"/>
Lasting power of attorney on self/partner	<input type="checkbox"/>	<input type="checkbox"/>
Lasting power of attorney on parents	<input type="checkbox"/>	<input type="checkbox"/>
Pension death benefit nomination	<input type="checkbox"/>	<input type="checkbox"/>
Who: _____		

SAVING FOR FREEDOM AND CHOICE

	YES	NO
Company pension:	<input type="checkbox"/>	<input type="checkbox"/>
Joined scheme	<input type="checkbox"/>	<input type="checkbox"/>
Obtaining max. employer contribution	<input type="checkbox"/>	<input type="checkbox"/>
10 years + savings and regular saving into an investment ISA	<input type="checkbox"/>	<input type="checkbox"/>
Value: _____	CURRENT	TARGET
<10 years savings regularly into cash based account	<input type="checkbox"/>	<input type="checkbox"/>
Value: _____	CURRENT	TARGET

DEBT REPAYMENT

	YES	NO
Mortgage reviewed	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage on track to be repaid by: _____		
Loans reviewed	<input type="checkbox"/>	<input type="checkbox"/>
Loans on track to be repaid by: _____		
Credit cards and overdraft reviewed	<input type="checkbox"/>	<input type="checkbox"/>
Credit cards and overdraft on track to be repaid by: _____		

SPENDING

	CURRENT	TARGET
Income level	_____	_____
Smart spending system in place		YES NO <input type="checkbox"/> <input type="checkbox"/>
Every pound has a job		<input type="checkbox"/> <input type="checkbox"/>

INSURANCE

	CURRENT	TARGET
Health	_____	_____
Life	_____	_____
Income	_____	_____

EMERGENCY CASH RESERVE

	CURRENT	TARGET
Other savings goal:	_____	_____

FUN AND LIFE EXPERIENCES

Holidays	_____
Entertainment	_____
Stuff	_____