

Name: _____ Date: _____ Freedom Launch Date: _____

We know that planning and preparation are key to achieving financial freedom and happiness. Having a clear vision of what you want to do with the next stage of your life will enable you to develop a financial plan that helps you achieve your goals. Your financial plan is designed to help you live a happy and healthy life and do the things that bring you most joy and a sense of purpose.

So before we talk about money, let's take a little time to think about what you want from your future life.

Happiness is about feeling joy but also about feeling valued and having a sense of purpose.
What brings you most happiness in your life right now?

What brings you the least happiness in your life today?

In the future, what would you like to do more of?

What new things would you like to start doing?

What would you like to do less of or stop doing?

Below are some typical areas where people want to make changes in the next stage of life or have specific financial goals. Which of these are relevant to you and what does it look like for you?

Areas for change	Relevant to you?		What does this mean for you?	
Life goals				
Work life – working less, retiring or changing job	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Personal development – learning or studying	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Starting a new business	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Taking up new interests or hobbies	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Moving home or investing in property	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Supporting children or grandchildren	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Travel and exploring	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Caring for others – parents, friends	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Voluntary or unpaid work	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Supporting charities	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Which of these are relevant to you and what does it look like for you?

Areas for change

Financial goals

- Investing in stock markets
- To give to charity or other causes I care about
- To feel secure about my finances
- To leave an inheritance to my loved ones
- To manage my tax as efficiently as possible
- To pay for future medical expenses
- To not be a financial burden to my family as I grow older

Relevant to you?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

What does this mean for you?

Summarise what is most important to you. What will make the most difference to your quality of life and future happiness and wellbeing.

How do you feel right now about achieving these goals?

What are you most worried about?

What are you most confident about?

How confident do you feel about achieving your goals?

