

CLIENT OBJECTIVES

A key to successful financial planning is to identify your personal objectives, so that you are better placed to achieve them. Leverage Planners have found that clients wish to set many of the following objectives. Which apply in your own case?

INCREASE my net spendable income

IMPROVE my quality of life

SAVE tax (including income tax, capital gains tax and inheritance tax)

INCREASE the return on my investments

SAVE money by using it effectively

INCREASE my expected income in retirement

GAIN peace of mind by feeling financially comfortable

REDUCE paperwork

IMPROVE my insight into present and future values of my pension schemes

INCREASE my financial security

REDUCE time spent worrying about my financial affairs

ACHIEVE financial independence

IMPROVE my business performance

SAFEGUARD my family and dependants

IMPROVE the organisation of my financial affairs

INCREASE my financial awareness

REDUCE personal, business and investment risks

INCREASE the net amounts I give to charity