What do you want to achieve?

- What would you do with your time if money wasn't an issue? (What would your life look like if you won Lotto?)

- What would you do differently if you knew you only had a set period of time to live?

- What do you want to happen in life?

- What don't you want to happen?

- What does success look like for you?

Your family • Do you have children? • Who is dependent on you? • Who could be dependent on you in the future? • If you have children, how important is education for you? • Do you want to leave a 'legacy' for your family?	

Your living situation • Do you own your home? • What do you like about your home? • What are your plans with future housing?(buying/ selling/upsizing/downsizing/ investment properties • Do you have a home loan? • How is your mortgage lending currently structured? Have you investigated alternative options?	
Your career or business • What is your current work / business? • Do you enjoy it? Why/Why not? • Have you thought in the future about working less/ early retirement/changing careers/starting a business? • If a business owner, what made you go into a business? • What do you enjoy about it? • Have you thought about an exit plan? • What are your future plans with your business? Growth plans, acquisition plans. • What did you do before parenthood? • What are your values around continuing or going back to work if children are still young?	
Your health and lifestyle What is important to you with your health and wellbeing? • sports health and fitness pursuits • travel / holiday goals • religious or spiritual needs • other hobbies / interests	

Your money • What is important to you about money? • Have you thought about what you like to achieve financially? • How do you feel about debt? • Do you feel 'in control' of your money? • Do you use a budget or a spending system? Do you have any current plans in place? • Retirement savings • Investment property goals • Current savings / purchases goals	
Investing • What does risk mean to you? • Do you consider yourself risk-averse or a risk-taker? • Have you had any previous experience with investing? • Do you utilise KiwiSaver?	

	In the next year?	In the next five years?
Purchases I want to make in the future.		
Personal or professional achievements I want to reach.		
Relationships I want to deepen or strengthen.		
Health and fitness – how do I want to feel?		
Places I want to go.		
Things I want to learn.		

Where are you at?

This is an exercise to help you establish where you are currently, and where you want to put your focus. Out of 100% you mark where you are currently at with the different areas of your life. From this, it may help you to establish some areas you want to work on over the next period, and set out some ways you can do this.

