



BALLAST

FINANCIAL PLANNING

Financial Checklist



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Your Details

Occupation	
Employment Status	
Salary/wages	
Investment Income	
Living expenses	
Debt	
Superannuation	

Financial Position

Do you have a will? Y/N

Do you have insurance? Y/N

List of your assets

Debt/Liabilities/Loans

Questions to Consider

What are your short-term goals?

What are your medium-term goals?

What are your long-term goals?

At what age would you like to retire?

What is your desired retirement income?

What is your risk profile?

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