

Goals sketchbook

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| --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **Name** | Insert your name | | **Date of completion** | 00/00/2020 | |  |

**Guide to completion**

In order to help you arrange your finances, you first need to identify your goals. These can be short, medium, or long term, and don’t have to be ambitious. Your goals and objectives might reflect what you need, or what you want, but they must come from you and reflect what you actually feel about various aspects of your life. This will help to create a bespoke financial strategy and solutions that directly meet your requirements, while remaining flexible enough to accommodate future changes.

Firstly, jot down some basic details about yourself. This will help set the scene, both for you in terms of thinking about your goals alone and if you discuss the output from this workbook with one of our advisers.

Next, try to think about some of your most important goals. The biggest ones that need the most planning, resource and time to achieve. These types of goals are often expressed as ‘bucket list’ goals. Use the space on page 4 to capture your thoughts. Don’t worry if you only have vague ideas at first. This is an iterative process, so you will come back and review your thoughts later on in the process.

Next, work through the sections on pages 5 and 6, adding detail in the spaces provided, to develop goals that are either shorter range, or require less resource or planning to achieve. Continue on a separate sheet if you need to - more detail is always preferable to less, and if you want to add additional comments or observations that are not covered under the headings, please feel free to do so, either in the boxes or in the ‘Other Comments’ section in this form.

**What next?**

The goals you identify here should form the starting point for your financial plan. If you’re working on your own financial plan, refer to our blog on this subject [here](https://abacus.ae/how-to-create-your-own-financial-plan/), for more direction on what to do next. If you decide to work with one of our advisers, this sketchbook will help your Discovery session go smoothly. Just have this sketchbook to hand at the Discovery session. You don’t need to send it to your adviser before the session, but you can if you wish.

Please insert the following information for both you and your partner/spouse.

|  |  |  |
| --- | --- | --- |
| Question | Answer | Answer |
| Name |  |  |
| Date of birth |  |  |
| Gender |  |  |
| Nationality |  |  |
| Marital Status |  |  |
| Any medical conditions |  |  |
| Child one name |  |  |
| Child two name |  |  |
| Child three name |  |  |
| Child four name |  |  |
| Other dependants |  |  |
| Occupation |  |  |
| Annual earnings |  |  |
| Inheritance |  |  |
| Existing protection benefits |  |  |
| Total assets |  |  |
| Total liabilities |  |  |
| Net position |  |  |
| Location of residence |  |  |
| UK Resident |  |  |
| UK Domicile |  |  |
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**What are your life goals?**

If you had unlimited time and resources what would be the   
top 5 things you would do in your life?

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**Other comments / observations**

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| What do you want to happen? | Who’s involved? | When should it happen? | Why does it matter to you? | What will it cost? | Do you have any concerns about it? |
| Career – i.e. changing career, promotions, non-execs, retirement, growing or selling a business etc… | | | | | |
|  |  |  |  |  |  |
| Home – i.e. paying off mortgage, changing main residence, purchasing additional property etc… | | | | | |
|  |  |  |  |  |  |
| Family – i.e. children’s education, protect against death/events, cost of care for parents, creating time for the family etc… | | | | | |
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| --- | --- | --- | --- | --- | --- |
| What do you want to happen? | Who’s involved? | When should it happen? | Why does it matter to you? | What will it cost? | Do you have any concerns about it? |
| Leisure – i.e. holidays, hobbies, learning new skills etc… | | | | | |
|  |  |  |  |  |  |
| Lifestyle – i.e. miscellaneous changes/improvements to your overall lifestyle etc… | | | | | |
|  |  |  |  |  |  |
| Giving – i.e. gifting assets, traditional philanthropy, charitable donations, pro bono work etc… | | | | | |
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*“Money is only a tool. It will take you wherever you wish, but it will not replace you as the driver”. –Ayn Rand*

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Thank you.