

conaghtys TOTAL accounting



financial health check

your name(s)

for the tax year

do you have tax deductible income protection insurance?
 Yes No Don't Know n/a

do you have a will that is up to date & accurate reflects your current wishes?
 Yes No Don't Know n/a

do you have adequate life cover to protect your dependants?
 Yes No Don't Know n/a

do you have adequate cover should you be incapacitated for some time
 Yes No Don't Know n/a

are you happy with your current home loan?
 Yes No Don't Know n/a

when do you want to retire?
 Now Never age?

do you have adequate provision for your retirement?
 Yes No Don't Know n/a

are you happy with your personal investment plan
 Yes No Don't Know n/a

would you like to discuss any of the above with us or our associates?
 Yes No Don't Know n/a

THINKING OUTSIDE THE SQUARE

WHAT	MUST	QUITE	C YOURSELF YOURSELF YOURSELF YOURSELF	ACTION
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