



## Financial Planning

- When will you take a careful look at your finances?
- When will you share this with your close family members?
- When will you draw up a “What I/we need to live on” budget?
- Have you considered speaking with an IFA (Independent Financial Advisor)? If so, when will you contact them? You have already spoken with them is it time for a further review?
- Have you put your other “essential” documentation in a place where your loved ones and executors know where to find them? Here we are referring to things such as banking, insurance, property details, wills. Does this documentation include the contact details for your banking, legal and financial advisors?
- Is your will up to date? When do you intend to make it so?