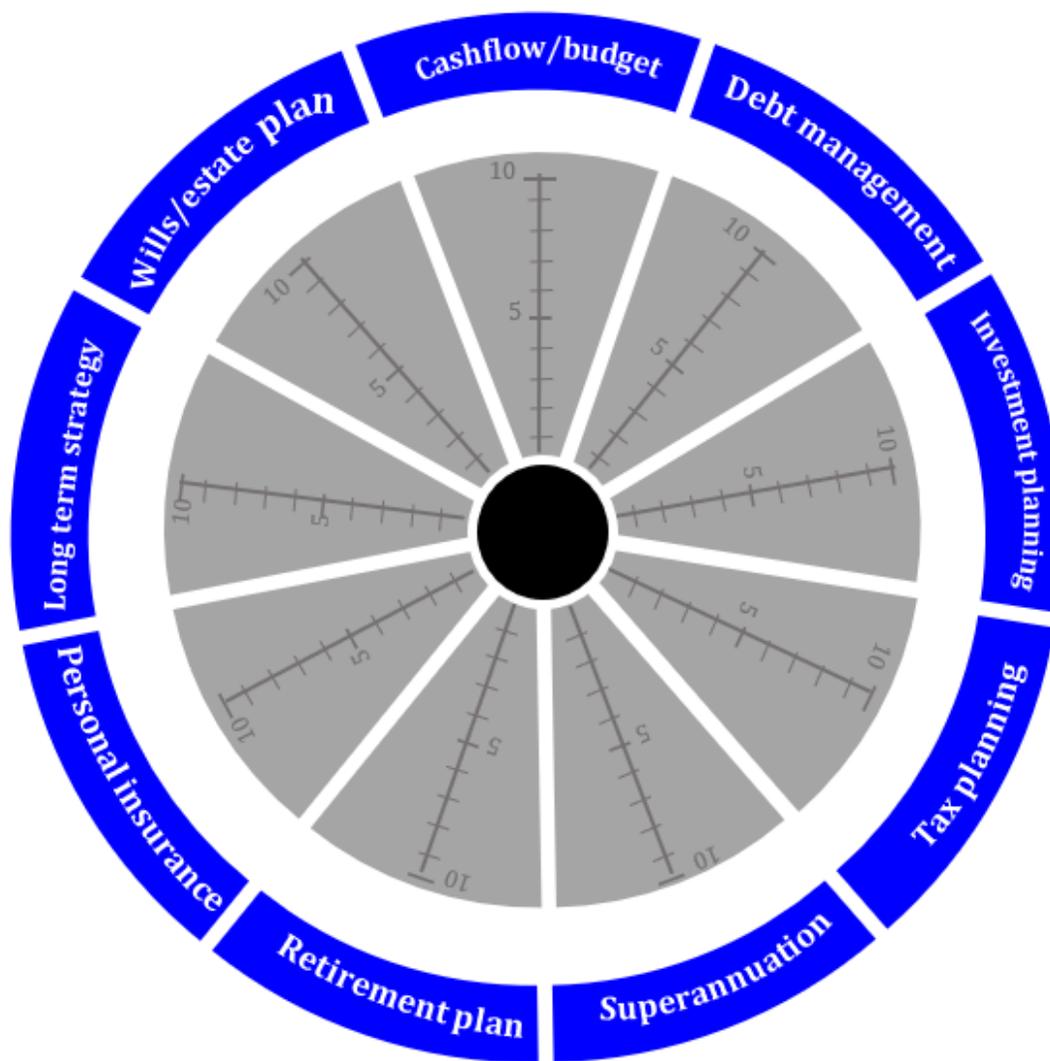
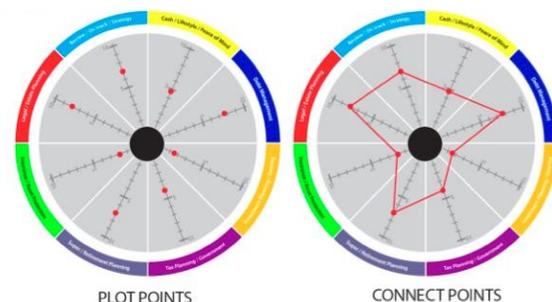


Financial Success Matrix...

You may have heard the analogy that ‘when a wheel is perfectly round, it can deliver you to your destination in more comfort and at higher speed’. It can also handle sudden changes in direction, unstable ground, and bumps in the road. So that we can get a better understanding of where you think you are financially right now, please take a moment to consider where you feel you sit on each of the 8 key areas of Financial Success. Plot each point on the scale (1 being ‘low satisfaction....’ - 10 being ‘could not be happier & no more room for improvement’). Once you have plotted all 8 key areas, join each dot with a line. This will show you how round your wheel is currently.



EXAMPLE



PLOT POINTS

CONNECT POINTS