

Financial Success Gap Analysis

At Maple Tree Wealth Management, we take pride in providing the best service and advice for your financial planning, insurance & wealth management needs. To understand how you are progressing financially, take 2 minutes to complete this Gap Analysis.

Name / s		
Please read each question and complete the boxes under "Where I am now" and "Where I would like to be" with what you would rate yourself. A description of the number rating is with each question. Tick what you feel is appropriate for yourself in "Priority for fixing this"		
Rate Yourself	Where I am now (please write the number)	Where I would like to be (please write the number)
1. How would you rate your overall financial organisation right now?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>← 1 2 3 4 5 6 7 8 9 10 →</p> <p>Completely disorganised Totally organised</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> </div>
Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority		
2. How confident are you that you know how much you will need (assets and income) for a long, comfortable stress free retirement?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>← We don't have any idea</p> <p>1 2 3 4 5 6 7 8 9 10 →</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>→ High level of certainty</p> </div> </div>
Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority		
3. How confident are you that you are on track to build the assets you will need for a long, comfortable stress free retirement?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>← Not confident at all</p> <p>1 2 3 4 5 6 7 8 9 10 →</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>→ Totally confident</p> </div> </div>
Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority		
4. How confident are you that you are taking advantage of all the opportunities to legally minimise your taxes?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>← Not confident at all</p> <p>1 2 3 4 5 6 7 8 9 10 →</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>→ Totally confident</p> </div> </div>
Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority		
5. How confident are you that your family would have enough income and assets in the event of your death or disability?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>← Not confident at all</p> <p>1 2 3 4 5 6 7 8 9 10 →</p> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 25px; margin-bottom: 5px;"></div> <div style="text-align: center;"> <p>→ Totally confident</p> </div> </div>
Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority		

Financial Success Gap Analysis

Rate Yourself	Where I am now (please write the number)	Where I would like to be (please write the number)
6. How confident are you that you know exactly what would happen to your assets, liabilities and super in the event of a serious illness or injury?	Not confident at all ← 1 2 3 4 5 6 7 8 9 10 →	1 2 3 4 5 6 7 8 9 10 → Totally confident
	Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority	
7. How involved (on a day to day level) do you want to be with the development of your financial plan and the selection of the appropriate investments, super, loans and insurance policies?	<input style="width: 50px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 50px; height: 30px; border: 1px solid #ccc;" type="text"/>
	Prefer to do everything ourselves ← 1 2 3 4 5 6 7 8 9 10 →	1 2 3 4 5 6 7 8 9 10 → Prefer to outsource
	Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority	
8. How confident are you that your loans are properly structured, tax effectively, with a clear plan to reduce bad debt?	<input style="width: 50px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 50px; height: 30px; border: 1px solid #ccc;" type="text"/>
	Not confident at all ← 1 2 3 4 5 6 7 8 9 10 →	1 2 3 4 5 6 7 8 9 10 → Totally confident
	Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority	

If you have scored less than 10 on more than 3 of the above, contact us today to book a complimentary 15 minute phone chat about how we can help you take control and improve your money situation.

Name: _____

Name: _____

Ph: _____

Ph: _____

Email: _____

Email: _____

Date: ___/___/_____

Date: ___/___/_____

Thank you