

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		
<p>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"</p>		
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> <div></div> <div>Completely disorganised</div> </div> <div> <div></div> <div>Totally organised</div> </div>	<div> <div></div> <div>Totally organised</div> </div> <div> <div></div> <div>Completely disorganised</div> </div>
<p>Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority</p>		
2. How confident are you that you know how much you will need (assets and income) for a long, comfortable stress free retirement?	<div> <div></div> <div>We don't have any idea</div> </div> <div> <div></div> <div>High level of certainty</div> </div>	<div> <div></div> <div>High level of certainty</div> </div> <div> <div></div> <div>We don't have any idea</div> </div>
<p>Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority</p>		
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> <div></div> <div>Not confident at all</div> </div> <div> <div></div> <div>Totally confident</div> </div>	<div> <div></div> <div>Totally confident</div> </div> <div> <div></div> <div>Not confident at all</div> </div>
<p>Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority</p>		
4. How confident are you that you are taking advantage of all the opportunities to legally minimise your taxes?	<div> <div></div> <div>Not confident at all</div> </div> <div> <div></div> <div>Totally confident</div> </div>	<div> <div></div> <div>Totally confident</div> </div> <div> <div></div> <div>Not confident at all</div> </div>
<p>Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority</p>		
5. How confident are you that your family would have enough income and assets in the event of your death or disability?	<div> <div></div> <div>Not confident at all</div> </div> <div> <div></div> <div>Totally confident</div> </div>	<div> <div></div> <div>Totally confident</div> </div> <div> <div></div> <div>Not confident at all</div> </div>
<p>Priority for fixing this: <input type="checkbox"/> ASAP <input type="checkbox"/> Next 3 months <input type="checkbox"/> Not a priority</p>		

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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 ← 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?	<div style="border: 1px solid black; width: 60px; height: 30px; margin: 0 auto;"></div>	<div style="border: 1px solid black; width: 60px; height: 30px; margin: 0 auto;"></div>
	Prefer to do everything ourselves ← 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?	<div style="border: 1px solid black; width: 60px; height: 30px; margin: 0 auto;"></div>	<div style="border: 1px solid black; width: 60px; height: 30px; margin: 0 auto;"></div>
	Not confident ← 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