



Wealth
Through
Sales
Free Training

General advice warning

This presentation has been prepared without taking account your objectives, financial situation or needs. Because of that you should, before acting on the advice, consider the appropriateness of the advice, having regard to your personal circumstances.

Barwon Wealth Management (ABN 46 666 998 652) provides Financial Advice as a Corporate Authorised Representative of Lifespan Financial Planning Pty Ltd (AFSL 229892).

Barwon Finance (ABN 97 656 459 997) (CRN 538960) and Darcy O'Rourke (CRN 538961) provide Mortgage Broking services. They are authorised Credit Representatives of Purple Circle Financial Services Pty Ltd (Australian Credit Licence 486112).

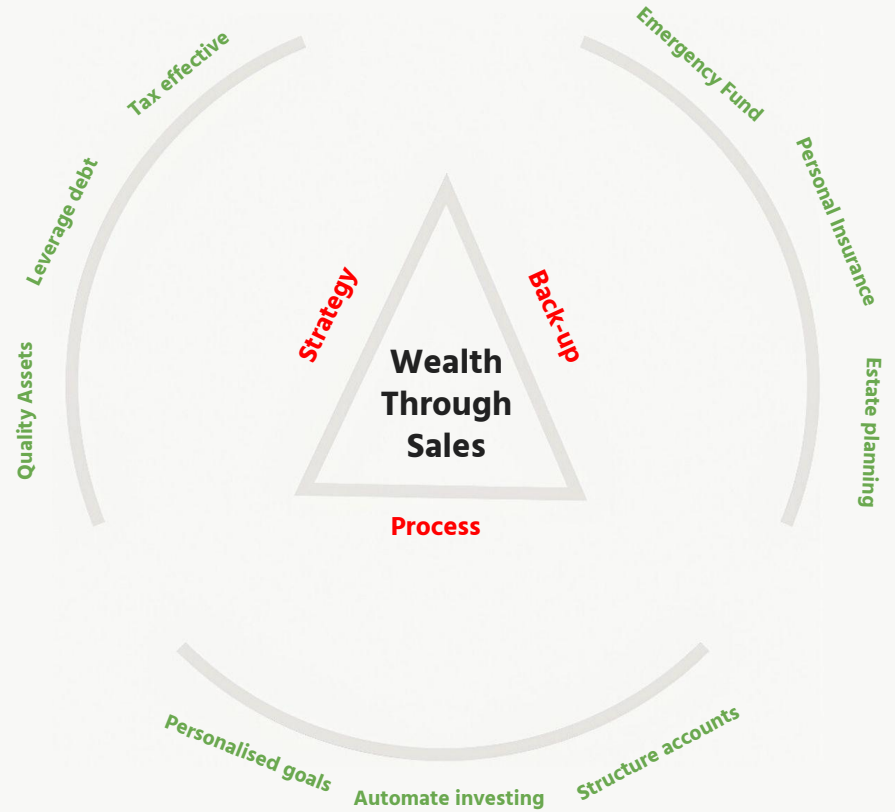




No progress and/or big issues

Some progress and/or small

Completely under control



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Categories for Goal Development

Lifestyle

- Where do you want to live?
- What holidays do you want to take?
- When do you want to have kids (how many)?
- What kind of car do you want to drive?
- What hobbies do you want to spend your time doing?

Retirement

- When do you want to stop working?
- What kind of lifestyle do you want when you retire?
- How do you want to spend your time when you're retired?
- What kind of purchases will you need to make in retirement?

Legacy

- Where do you want to send your kids to school?
- Do you want to provide financial help to kids for property/weddings.
- What kind of charities do you want to support?
- What kind financial protection do you want for your family if you pass away?

Goal Development

Goal	Dollar	When	Priority

SMART – Specific, Measurable, Attainable, Relevant & Time-bound

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Enquire about working with us

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