

Name	Contact Number:
Email	Employer:
(P)ersonal Money Score	Total Score (/100)
(A)rea of Focus	<ol style="list-style-type: none"> 1. Money Management () 2. The Property Ladder () 3. Protecting What's Important () 4. Investing in your Future () 5. Modern Retirement Planning ()
5 Key Questions	<ol style="list-style-type: none"> 1. Are you concerned about your levels of debt? (Yes/No) 2. Do you have a budgeting plan written down, online or on an app? (Yes/No) 3. Have you completed your Pension Beneficiaries Form? (Yes/No) 4. Do you have a Will and/or LPA's in place? (Yes/No) 5. Can you afford to increase your workplace pension contributions? (Yes/No)
(W)hat are the Next Steps	<ul style="list-style-type: none"> • Education - Maji Platform () • Guidance - Group Workshops () • Adviser Appointment ()
(A)ctions to Complete	<ul style="list-style-type: none"> • Visit the Debt Management page on the FinWELL website • Watch our Money Management videos • Complete the 21 questions to get your Personal Money Score • Connect your financial accounts on your Maji profile • Create your budgeting plan on your Maji profile • Start building your financial plan on your Maji profile • Consider one of the Digital Learning Journey's on the Maji Platform • Consider increasing your pension contributions if affordable • Nominate your Pension Beneficiaries • Take a look at our Employees Guide to Financial Advice • Arrange appointment with one of the advisers on the Maji Platform
Advice to Consider	<ul style="list-style-type: none"> • Debt Management () • Mortgages /Protection() • Wills/LPA's () • Investing () • Pension Reviews/Consolidation () • Retirement Planning () • Inheritance Tax Planning ()