



Our first conversation™

Name:	<input type="text"/>	Date:	<input type="text"/>
Address:	<input type="text"/>		
	<input type="text"/>	Postcode:	<input type="text"/>
Email:	<input type="text"/>	Date of birth:	<input type="text"/>
Home tel:	<input type="text"/>	Work tel:	<input type="text"/>
		Mobile:	<input type="text"/>

The R-Factor Question®*

Your Aspirations

If we were meeting here 3 years from today, looking back over those years, what has to have happened both personally and professionally, during that period, for you to feel happy with your progress?

Answers:

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

Please go back and circle the numbers of your three most compelling aspirations.

Your Concerns

What are your main concerns at the moment?

To help you, here are some answers given by other clients:

- | | | |
|-----------------------------------|-------------------------------|---|
| ● Uncertain about insurance cover | ● Pension details unclear | ● My business is too reliant upon me |
| ● Worried about inheritance tax | ● Poor investment performance | ● How will assets be split in a divorce |
| ● Paying too much tax | ● Don't keep good records | ● Fearful of losing what I have created |
| ● Don't have a plan | ● No emergency fund | ● What happens if I lose my job |
| ● Too much debt | ● My parents may need help | /business |

Answers:

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>

Your Opportunities

What specific opportunities are available to you, either now or in the next 3 years?

To help you, here are some answers given by other clients:

- Purchase a new home
- Increase personal wealth/financial security
- Sell my business
- Do some home improvements
- Help my children financially
- Purchase a holiday home or investment property
- Go back to school or retraining
- Give to a charity
- Start my own or another business
- Pass assets to children
- Learn a new sport or enjoy a new pastime
- Choose tax efficient investments
- Take care of health and nutrition
- Take more time off
- Engage in voluntary work
- Spend more time with family
- Send kids to private school/university
- Gain job promotion or increase business profitability

Answers:

1	
2	
3	
4	
5	

Your Strengths

What are your top 5 strengths and things that give you an 'unfair advantage'?

To help you, here are some answers given by other clients:

- Have a good job/profitable business
- Lots of friends
- Well educated
- Happily married
- Have company benefits and/or pension plan
- Blessed with common sense
- Have good health
- Very focused and dedicated with strong self-belief
- Expect to receive an inheritance
- Hard worker
- No mortgage and debt free
- Like to help others and generous by nature
- Surplus cash for investment
- Optimistic about my future and have a positive outlook
- Highly skilled and experienced in chosen business/career
- Retired with a good pension
- Well organised and a good planner
- Good at getting the best from other people

Answers:

1	
2	
3	
4	
5	

Please either email, post or fax this completed form back to us at:

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Office use only:

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