

Financial planning for your future

This checklist will help you to ask yourself the right questions. This enables you to make the best possible preparation for a personal consultation about your personal financial planning.

- Will my personal situation change in the next few years?
- What goals do I have, and what questions would I like to have answered?
- What is my current budget and how could this change in the future?
- Outside my normal budget, do I have any wishes or dreams that I would like to bring about (round-the-world trip, vacation home, etc.) and, if so, what financial means would I need for this?
- Which needs (security, flexibility, etc.) are particularly important to me? Which of these must be taken into account without fail?
- Will I move house, if need be, in the foreseeable future and, if so, what do I want from the new living environment?
- Would you like to buy residential property in the near future?

Contact us

We will be happy to arrange a personal consultation.

Call us at 0844 200 114*;

Mon.–Fri., 08:00–20:00.

For more information, visit our website at:

credit-suisse.com/financialplanning

* Telephone conversations may be recorded.

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