

Goals

**Short Term Goals –
Next 3 years**

Cashflow

Estate Planning

**Protection –
Lump Sum**

**Investments –
accessible?**

**Long Term Goals – 3
years +**

Debts



MODULUS
FINANCIAL PLANNING

**My Financial
Health Check**

**Protection -
Income**

**Investments –
Longer term**

Pensions – Workplace and Private

State Pension