

XY Training – Module 1

True or False?

Question 1:

Did 74% of people consider their most noteworthy financial milestone as living mortgage free?

True False

Question 2:

In regard to the 2014 IOOF White Paper, did more than 86% of clients say that achieving their core goals and lifestyle objectives were the measure as to whether or not their ongoing financial planning experience had been successful?

True False

XY Training – Module 1

True or False?

Question 3:

In regards to helping your clients achieve their financial goals, you will not be paid an ongoing passive income stream.

True False

Question 4:

In regards to ongoing cash flow advice, was the percentage of advisers with a core philosophy in that, more than 20%?

True False

XY Training – Module 1

True or False?

Question 5:

In the study from ING, the average age of first home ownership had jumped in 2015 to 35.7.

True False

Question 6:

The average Australian refinances their mortgage every 4.9 years.

True False

Question 6:

The three stages of your client's ideal financial life are financial control, financial security and financial freedom.

True False