

Aon Money Habits

ACTION PLANNER

-  **1** Understand your behaviour to money
-  **2** How you feel about money
-  **3** Implementation Intentions

This action planner is designed to support you taking part in Aon's financial wellbeing programme.





1 Understand your behaviour to money

Read the statements and **tick the box you think applies to you.**
If you are unsure you are most likely a Slender.



Spender



- I earn it and can spend it however I like
- Life is too short to worry about money
- It won't happen to me
- Don't talk to me about my money habits
- I want to look successful
- I'm always optimistic



Slender



- I do the right thing but I'm not getting ahead
- I'd like financial security
- I feel guilty if I spend
- I find talking about money stressful
- More money would solve my problems
- I'm doing okay but I want more



Defender



- I want financial security
- I hate waste
- I know I am good with money
- I am constantly learning about money
- I find money interesting and an enabler
- I have peace of mind that I am okay for the future





	Spender	Slender	Defender
Do you have a handle on incomings and outgoings?	No	Maybe	Yes
Do you have a safety limit in your bank account?	No	Maybe	Yes
Do you feel guilty after an impulse purchase?	No	Yes, sometimes	I never purchase on impluse
Do you have money goals?	No, unlikely	Yes, possibly	Yes

I am a **. My partner is a** **.**



3 Implementation Intention | Strengthen your behaviour With Money

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

When?

Where?

Outcome:

Review/Learnings. Date:

.....

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3 Implementation Intention | Money hacks for new money habits

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

When?

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Where?

Outcome:

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Review/Learnings. Date:

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3 Implementation Intention | Simple set up for money-life Balance

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.


What?

When?

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-
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Where?

Outcome:

Review/Learnings. Date:

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3 Implementation Intention | Invest in what you understand/Have a plan

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

A rectangular box with a light gray border. At the top, there are six lightbulb icons. Below them, the word "What?" is written in bold black text. The rest of the box is blank.

When?

A rectangular box with a light gray border and a folded top-right corner. On the left side, there is a vertical list of seven gray dots. To the right of the dots, the word "When?" is written in bold black text. The rest of the box is blank.

Where?

A rectangular box with a light gray border. On the left side, there is a vertical list of seven gray squares. To the right of the squares, the word "Where?" is written in bold black text. Below the text, there are seven horizontal lines for writing. The rest of the box is blank.

Outcome: **Review/Learnings. Date:**

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A large rounded rectangular box with a light gray border. It contains two columns of text. The left column is labeled "Outcome:" and the right column is labeled "Review/Learnings. Date:". Below each label are four rows of dotted lines for writing.



3 Implementation Intention | Talk about money

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

When?

Where?

Outcome:

Review/Learnings. Date:

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3 Implementation Intention | Protect those you love

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

When?

Where?

Outcome:

Review/Learnings. Date:

3 Implementation Intention | Nurture future you

Plan your actions.

Complete your what, when and where.

Document the outcome and review this at a specified date in the future.

What?

When?

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Where?

Outcome:

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Review/Learnings. Date:

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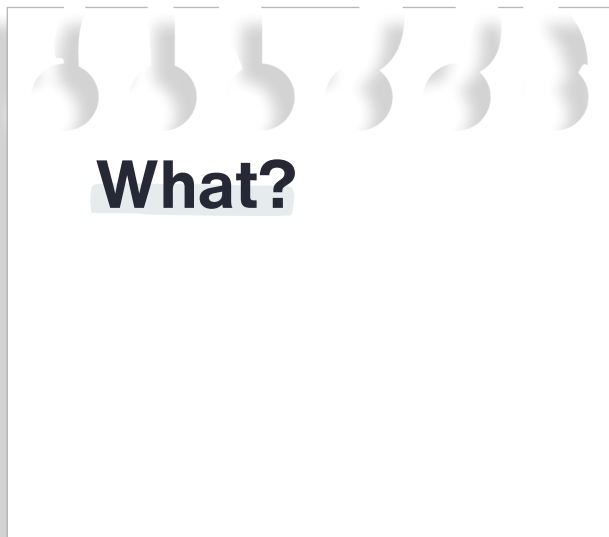
.....

3 Implementation Intention | Don't leave money on the table

Plan your actions.

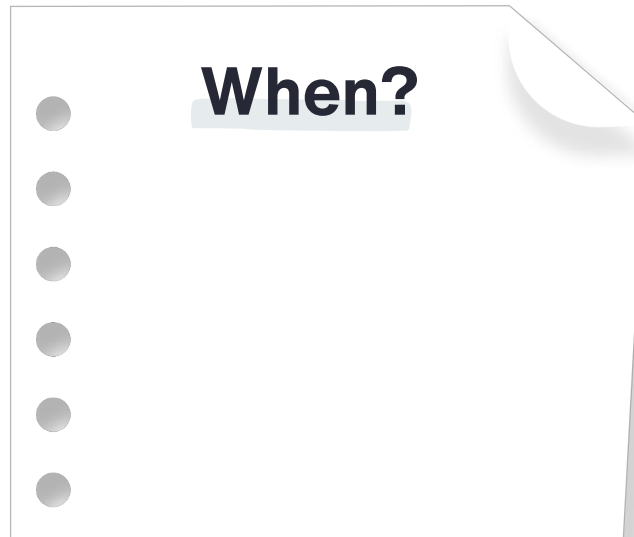
Complete your what, when and where.

Document the outcome and review this at a specified date in the future.



What?

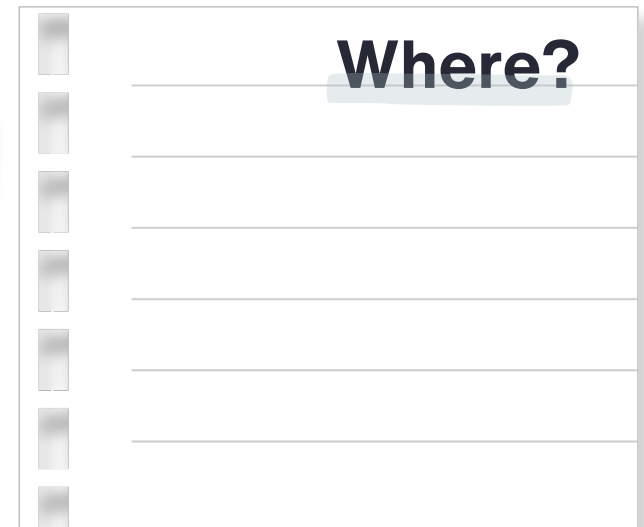
This section is titled "What?" and features six lightbulb icons at the top, suggesting a focus on ideas and actions.



When?

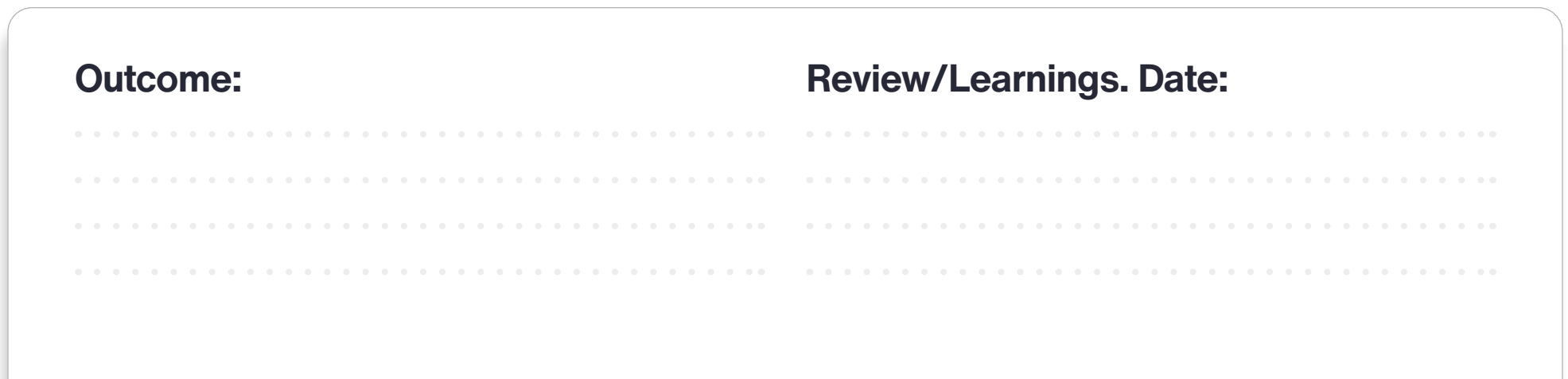
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This section is titled "When?" and is styled as a notepad with a folded corner and a vertical list of seven bullet points for scheduling.



Where?

This section is titled "Where?" and is styled as a lined notepad with a vertical list of seven rectangular boxes on the left side, likely for location or context notes.



Outcome:
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Review/Learnings. Date:
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This section is a large rounded rectangle containing two columns of dotted lines for text entry. The left column is labeled "Outcome:" and the right column is labeled "Review/Learnings. Date:".

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