

Financial Life Check-up

Name: _____

Date: _____

<i>Not Satisfied</i>		<i>Mostly Satisfied</i>		<i>Very Satisfied</i>
1	2	3	4	5

<i>I am satisfied...</i>	
1 ...with my ability to meet my financial obligations.	
2 ...with the income potential my current job or career provides me.	
3 ...with my spending habits.	
4 ...with the level of debt I carry.	
5 ...with the “extras” that I am able to buy for myself and my loved ones.	
6 ...with the level and quality of insurance protection I currently have.	
7 ...with the amount of money that I save and invest on a regular basis.	
8 ...with my current investment choices	
9 ...that I am on-track to build a retirement nest egg.	
10 ...with the level of employee benefits I receive.	
11 ...with my style of personal bookkeeping and financial records management.	
12 ...with my plans for my children’s education.	
13 ...with my estate plan.	
14 ...with my level of charitable giving.	
15 ...with the level of personal financial education I have attained.	
16 ...with how I respond emotionally to my personal finance issues.	
17 ...with my ability to communicate about my financial issues.	
18 ...with the feelings I have about my money life.	
19 ...that financial issues do not cause stress or strain in the relationships that are important to me.	
20 ...with the working relationships I have with my financial service providers (insurance agent, banker, financial planner, broker, accountant, attorney, etc...)	
Total	

Comments _____
