

# EVALUATE YOUR FINANCIAL WELL-BEING

## How comfortable are you with your financial progress?

Please fill in the number that best describes your comfort level.

Not Comfortable-----Somewhat comfortable-----Very comfortable  
1                    2                    3                    4                    5

1. with my ability to meet my expenses \_\_\_\_\_
2. with my ability to generate income \_\_\_\_\_
3. with my chosen career or profession \_\_\_\_\_
4. with the amount of time and effort I devote to my career \_\_\_\_\_
5. with my current standard of living \_\_\_\_\_
6. with my financial net worth \_\_\_\_\_
7. with the location and size of my home \_\_\_\_\_
8. with the enjoyment and comfort level of my home \_\_\_\_\_
9. with the amount and interest rate of my mortgage \_\_\_\_\_
10. with my level of on going savings \_\_\_\_\_
11. with the amount of my emergency fund \_\_\_\_\_
12. with my savings for specific financial and personal goals \_\_\_\_\_
13. with the amount of positive cash flow \_\_\_\_\_
14. with my level of spending and how I spend my money \_\_\_\_\_
15. with my level of debt \_\_\_\_\_
16. with my FICO credit score \_\_\_\_\_
17. with the precautions I take regarding identity theft \_\_\_\_\_
18. with the overall quality of my financial decisions \_\_\_\_\_
19. with my knowledge of personal finance & investing \_\_\_\_\_
20. with my current investment asset allocation \_\_\_\_\_
21. with the performance of my investments \_\_\_\_\_
22. with my real estate ownership \_\_\_\_\_
23. with my income tax strategy \_\_\_\_\_
24. with the funding of my children's education \_\_\_\_\_
25. with the funding of my pension, retirement plan, IRA \_\_\_\_\_
26. with my progress towards retirement \_\_\_\_\_
27. with how I use my employee benefits \_\_\_\_\_
28. with the amounts and types of my insurance \_\_\_\_\_
29. with my estate plan \_\_\_\_\_
30. with my family financial conversations (children/parents/etc) \_\_\_\_\_
31. that my family will be taken care of \_\_\_\_\_
32. with my level of charitable giving and volunteer work \_\_\_\_\_
33. that I have identified my long term and short term goals \_\_\_\_\_
34. that there are things in my life that I am passionate about \_\_\_\_\_
35. with my overall health and physical well being \_\_\_\_\_
36. with the environment where I live, work, and play \_\_\_\_\_
37. with my investment in myself \_\_\_\_\_
38. with the balance in my life \_\_\_\_\_
39. with the time I take for myself, my family and friends \_\_\_\_\_

# EVALUATE YOUR FINANCIAL WELL-BEING

**How comfortable are you with your financial progress?**

- 40. with my community and social network \_\_\_\_\_
- 41. with my overall financial well-being and personal satisfaction \_\_\_\_\_
- 42. with my discipline to do the financial things I know  
    need to be done \_\_\_\_\_
- 43. with what I have accomplished so far \_\_\_\_\_
- 44. that I am better off this year compared to last year \_\_\_\_\_
- 45. that financial issues do not strain my relationships \_\_\_\_\_
- 46. with the way I keep my financial records \_\_\_\_\_
- 47. with my technology \_\_\_\_\_
- 48. with my progress toward simplifying my life \_\_\_\_\_
- 49. with how I feel about money \_\_\_\_\_
- 50. with the progress towards my life-time goals \_\_\_\_\_

Total \_\_\_\_\_ (250 maximum)

Here are my concerns:

---

---

---

---

---

---

---

---

---

---