

Name: _____ Date: _____

Financial Satisfaction Assessment

Rate yourself from 1-5, with 1 = completely agree and 5 – completely disagree

- _____ I know the amount of money I should save to reach and goals and save it.
- _____ My relationship with money supports me.
- _____ My actions and my spending are congruent.
- _____ I can easily meet my financial obligations.
- _____ I have a bookkeeping system in place and use it regularly.
- _____ I understand my employment-related benefits.
- _____ I have adequate life, health, disability, car, homeowners and long term care insurance.
- _____ I have a current will or trust.
- _____ I understand and like my existing investments.
- _____ I have an investment philosophy that I follow.