



Financial Life Checkup

Name: _____ Date: _____

Phone: _____ Email: _____

The statements below will help you think about and assess how satisfied you are with the financial aspects of your life.

[Select a score from 1 to 5]

- 5 = Very Satisfied**
- 4 = Satisfied**
- 3 = Moderately Satisfied**
- 2 = Dissatisfied**
- 1 = Very Dissatisfied**
- NA = not applicable**

I am satisfied...		
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 my level of cash reserves	
6	with my provisions to take care of my family in the event of my premature death	
7	with my provisions to take care of my family in the event of my disability	
8	with the level and quality of my medical insurance	
9	with the amount of money that I save and invest on a regular basis	
10	with my current investment choices	
11	that I will be able to maintain a comfortable living in retirement	
12	with the level of employee benefits I receive	
13	with my style of personal bookkeeping and financial records management	

14	with my plans for my children's or grandchildren's education	
15	with my choice of guardian for my minor children	
16	with my estate plan	
17	with my provisions for long term care.	
18	with my level of charitable giving	
19	with the level of personal financial education I have attained	
20	with how I respond emotionally to my personal financial issues	
21	with my working relationships with my financial services providers (that is accountant, attorney, banker, insurance agent, and financial advisor)	

Adapted from Financial Life Planning™

How did you hear about us? _____

How can we help you? _____

What do you expect from a financial advisor? _____
