



Money Issues Baseline

Please rate the following statements from 1 to 5 with 1 being “not satisfied” to 5 being “very satisfied” and N/A if it is not applicable to you.

I am satisfied with ...

Budget

- _____ my ability to meet financial obligations.
- _____ my spending habits.
- _____ the spending habits of family members.
- _____ the level of debt I carry.
- _____ my ability to maintain an adequate emergency fund.
- _____ the "extras" that I am able to buy for myself and/or loved ones.

Security

- _____ the amount and types of insurance protection I currently have.
- _____ the security of my current cash-flows.
- _____ the amount I save and invest on a regular basis.
- _____ my ability to meet short-term financial goals.
- _____ my ability to meet long-term financial goals (e.g., education, retirement)
- _____ my current investment choices

Plans

- _____ my personal financial records management.
- _____ my plans for providing support to loved ones (e.g., parents, children, grandchildren)
- _____ my estate tax reduction strategy.
- _____ my level of charitable giving.
- _____ my level of financial education.

Comfort

- _____ how I respond to difficult financial circumstances.
- _____ my ability to maintain my current lifestyle (from cash flow perspective)
- _____ my ability and willingness to communicate about my financial matters.
- _____ the level my finances support my values.
- _____ how my finances affect my personal relationships.
- _____ the working relationships I have with my financial service providers.

Name: _____