



# Financial Life Checkup

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

The statements below will help you think about 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 current level of income	
2	with my spending habits	
3	with the level of debt I carry	
4	with my level of cash reserves	
5	with my provisions to take care of my family in the event of my death	
6	with my provisions to take care of my family in the event of my disability	
7	with the quality of my medical insurance	
8	with the amount of money that I save and invest on a regular basis	
9	with my current investment choices	
10	that I will be able to maintain a comfortable living in retirement	
11	that my investments will hold up in a recession or war	
12	with my style of managing my financial records	
13	with my plans for my children's or grandchildren's education	

14	with my choice of guardian for my minor children	
15	with my Will, Power of Attorney, and other estate planning documents	
16	with my provisions for long term care	
17	with my level of charitable giving	
18	that I am paying as little as possible in taxes	
19	with the level and quality of my homeowners and auto insurance, etc.	
20	with my working relationships with my financial services providers (accountant, attorney, banker, insurance agent, and financial advisor)	

Adapted from Financial Life Planning™ by Mitch Anthony

How did you hear about me? \_\_\_\_\_

How can I help you? \_\_\_\_\_

What are you looking for in a financial planner? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

May I add you to my email list? Yes \_\_\_\_\_ No \_\_\_\_\_