

Financial Questionnaire Assessment

Please complete the following personal profile information.

Name _____ Date _____

Address _____ City _____ State _____ Zip _____

E-mail _____

Phone _____ Referred by _____

Please choose the single answer that best fits your personal financial picture. Each answer is assigned a certain number of points which will be totaled at the end of the assessment.

Do you have a plan for monthly spending to track how much you save, spend and earn?

- I have a plan and track everything I spend every day.
 I keep track of the big things.
 I try to see what I've spent when I balance my checkbook.
 I spend without thinking about where the money goes

Do you worry about having adequate money for your needs?

- Never Seldom Monthly Often

How often do you argue or disagree with your companion about finances?

- Never Seldom Monthly Often

How much are you saving monthly?

- Save 10% Save 6% Save 3% Save 1%
 I have little or no savings Spend more than I make

Do you know your financial net worth?

- I could draft a personal income statement, balance sheet, and show my personal net worth.
 I have recorded assets and have a basic idea what I'm worth.
 I do not know my financial net worth.

How many books or articles about finances have you read in the past year? _____

Give one (1) point for each book or article read.

What percentage of your income is used toward paying off debt?

- I have no debt Less than 20% Less than 30%
 Less than 40% Less than 50% Over 30%

(Please turn the page over and complete side 2.)

Financial Health *and Fitness* LTC

Have you considered the rules of the financial games you are playing and the risks associated with changes to those rules?

- I have read my credit card contracts, insurance policies, and other important papers in the past year.
- I am somewhat familiar with the terms of the financial contracts I have entered into.
- I have never read my contracts or policies.

What is your plan for retirement?

- I have chosen a retirement date, know how much I need to retire and have a written plan in place to reach the goal.
- I have discussed retirement and am working on a plan.
- I make consistent deposits into retirement savings.
- I make occasional deposits into retirement savings.
- I have not thought about retirement.

Do you understand that taxes can affect your finances and how?

- I understand tax law, keep good records, understand the difference between tax-free and tax-deferred investments, and pay no more taxes than are required by law.
- I understand some tax law and keep some records.
- I have considered investing in tax-free and tax-deferred retirement programs.
- I let my accountant take care of my taxes.

It is important to have all your important financial papers organized, such as insurance policies, trusts and wills, and an estate. Have you completed the task, additionally do you have a plan in place to protect assets against loss, theft, and Taxes?

- I know where all my critical documents are located and have an estate plan that includes updated wills and trusts.
- I know where most of my financial papers are and have discussed estate planning.
- I could find my critical documents if necessary.
- My companion knows where all that stuff is.
- I have no estate plan and no idea where I keep my papers.

Are you sufficiently prepared for the future?

- I have at least 6 months liquid emergency reserves and adequate life, health, and disability insurance.
- I have adequate insurance and three month's savings.
- I have adequate insurance but no savings.
- I'm not sure about my financial future.

Thank you for taking the financial assessment. A Financial Life Coach will discuss your results with you.

Please submit your financial assessment via confidential fax to 866-213-5421 or email to fqa@fhfltc.com or you may submit in person at our center. A Financial Coaching Specialist will contact you to schedule your complimentary coaching session to discuss your results with a Financial Life Coach.

Financial Health and Fitness strives to maintain the highest code of ethics as we conduct our services in the strictest confidentiality

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