

## FINANCIAL HEALTH ASSESSMENT

Answer each question. If true, check the box. Be rigorous, be a hard grader. If the statement is sometimes or usually true, please do not check the box unless the statement is virtually always true for you. If the statement does not apply to you or will never be true for you, check the box. (You get credit for it because it does not apply or will never happen). You may change any statement to fit your statement better.

<input type="checkbox"/>	I live on a weekly budget that allows me to save and not suffer.
<input type="checkbox"/>	I currently live well and within my means.
<input type="checkbox"/>	I have returned or made good on any money I have borrowed – exclude formal loans and credit cards.
<input type="checkbox"/>	I pay my bills on time, virtually always.
<input type="checkbox"/>	I am current with payments on all loans and credit cards that I have.
<input type="checkbox"/>	Any parking tickets or child support I owe is paid and current.
<input type="checkbox"/>	All my tax returns have been filed and all my taxes have been paid.
<input type="checkbox"/>	I have no legal clouds hanging over me.
<input type="checkbox"/>	I have six months' living expenses in a money market-type account.
<input type="checkbox"/>	I currently save at least 10 percent of my income.
<input type="checkbox"/>	I have a financial plan for the next year.
<input type="checkbox"/>	I am putting aside enough money each month to reach financial independence.
<input type="checkbox"/>	I know how much I must have to be financially independent and I have a plan to get there.
<input type="checkbox"/>	My income source or revenue base is stable and predictable.
<input type="checkbox"/>	My earnings outpace inflation, consistently.
<input type="checkbox"/>	I am on a career, professional or business track that is or will soon be financially rewarding.
<input type="checkbox"/>	My earnings are commensurate with the effort I put into my job.
<input type="checkbox"/>	I have no loose ends at work.
<input type="checkbox"/>	I rarely miss work due to illness.
<input type="checkbox"/>	I know how much I am worth.
<input type="checkbox"/>	My investments do not keep me awake at night.
<input type="checkbox"/>	My assets (business, car, home, possessions, treasures) are well insured.
<input type="checkbox"/>	I have excellent private medical insurance.
<input type="checkbox"/>	I have life and disability insurance to provide for my family in the event of my death or disability.
<input type="checkbox"/>	My will is up to date and accurate.
<input type="checkbox"/>	I am in relationship with people who can assist in my professional, personal or financial development.