

# Financial Wellness Survey

Name \_\_\_\_\_ Date \_\_\_\_\_

Not Satisfied	Moderately Satisfied	Very Satisfied
1	2   3   4	5

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

I am satisfied...	
...with my ability to meet my financial obligations.	
...with my current job or career.	
...with my spending habits.	
...with the level of debt I carry.	
...with the “extras” that I am able to buy for myself and/or loved ones.	
...with the level and quality of insurance protection I currently have.	
...with the amount of money that I save and invest on a regular basis.	
...with my current investment choices.	
...that I am on track to have enough money for financial independence.	
...with the level of employee benefits I receive.	
...with my style of personal bookkeeping and financial records management.	
...with my plans for my children’s education.	
...with my estate plan.	
...with my level of charitable giving.	
...with my housing situation.	
...with how I respond emotionally to my personal finance issues.	
...with my ability to communicate about my financial matters.	
...with the feelings I have about my money life.	
...that financial issues do not cause stress or strain in the relationships that are important to me.	
...with the working relationships I have with my financial service providers (that is, insurance agent, banker, financial planner, broker, and accountant).	

