

Financial Well-Being Self-Evaluation

The following self-evaluation is an opportunity to see where you are now and consider where you would like to be. Rate yourself from 1 to 5 for each question—1 being lowest and 5 being highest. Total your score for each category. Identify which two categories you would like to focus on for improvement. You may want to choose your two lowest-scoring categories. Also note what is working well and what needs to be done to stay on the right track.

1. Personal Finances

- | | | | | | |
|--|---|---|---|---|---|
| a. I know my income sources and expenses well | 1 | 2 | 3 | 4 | 5 |
| b. I know if I run a surplus or a shortfall in my budget | 1 | 2 | 3 | 4 | 5 |
| c. I know the assets I own and how well they are growing | 1 | 2 | 3 | 4 | 5 |

Total _____

2. Big Goals

- | | | | | | |
|---|---|---|---|---|---|
| a. I keep a list of experiences I choose to have that will bring great joy to my life | 1 | 2 | 3 | 4 | 5 |
| b. I have the ability to savor life now, not just in the future | 1 | 2 | 3 | 4 | 5 |

Total _____

3. Wellness

- | | | | | | |
|--|---|---|---|---|---|
| a. I value my health and protect it with good health insurance | 1 | 2 | 3 | 4 | 5 |
| b. I make self-care a priority (nutrition/exercise/rest) | 1 | 2 | 3 | 4 | 5 |

Total _____

4. Retirement

- | | | | | | |
|---|---|---|---|---|---|
| a. I know what I need to save each year | 1 | 2 | 3 | 4 | 5 |
| b. I am on track | 1 | 2 | 3 | 4 | 5 |

Total _____

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5. Family

- | | | | | | |
|--|---|---|---|---|---|
| a. I have important financial conversations with my family | 1 | 2 | 3 | 4 | 5 |
| b. I have an estate plan that reflects my responsibilities | 1 | 2 | 3 | 4 | 5 |

Total _____

5. Security

- | | | | | | |
|--|---|---|---|---|---|
| a. I know what types and amounts of insurance I need | 1 | 2 | 3 | 4 | 5 |
| b. I can replace my earned income and have a Plan B | 1 | 2 | 3 | 4 | 5 |

Total _____

My two categories for improvement: _____ and _____

My two action items to take this week are:

1. _____

2. _____

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