



Please take a few minutes to answer the following questions as truthfully as possible. These items may provide ideas for financial goals in the short or long term.

	Yes	No
1. Do you feel like you're in control of your money?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a spending plan/budget—in writing?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have financial goals—in writing?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you have an adequate emergency fund of at least three to six months of income?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you regularly track your spending using a method such as a receipt can, ledger, envelopes, account book, or computer program?		<input type="checkbox"/>
6. Have you calculated your net worth in the past year?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you regularly talk with family members about money/financial goals?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are you “on track” with saving money for long-term financial goals?	<input type="checkbox"/>	<input type="checkbox"/>