HOW TO CHECK-IN WITH YOURSELF

It's fast, simple and introspective

Only Two Steps

1. Take no more than 10 seconds to assess yourself honestly, with each of the statements. Don't overthink it.
   1 - NOT AT ALL TRUE | 5 - ABSOLUTELY TRUE

2. Tally your points at the end of the assessment, see what the results suggest, and reflect on your thoughts for a good 5-7 minutes.

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FINANCIAL CONCEPTS ZOOM WEBINAR

SAVE YOUR SEAT. REGISTER TODAY.

THIS IS A SELF-ASSESSMENT TOOL AND NOT A FINANCIAL PLAN, PROFESSIONAL EVALUATION, OR ADVICE. FOR PERSONALIZED ADVICE, WORK WITH A LICENSED PROFESSIONAL.

FINANCIAL HEALTH SELF-ASSESSMENT

GIVE YOURSELF GRACE
GIVE YOURSELF A PLAN

RATE YOURSELF FROM 1 TO 5

1 = NOT AT ALL TRUE | 5 = ABSOLUTELY TRUE

I HAVE 4 + MONTHS OF AVAILABLE INCOME	
I FOLLOW A MONTHLY BUDGET	
I KNOW MY TOTAL DEBT AND PAYOFF DATES	
I AM CONTRIBUTING TO A RETIREMENT SAVINGS PLAN	
I HAVE ALL **3** SAVINGS (FIXED, INDEXED, VARIABLE)	
I HAVE LIFE INSURANCE WITH LIVING BENEFITS	
I HAVE A CONTINGENT JOB IN MIND	
TOTALS	

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FINANCIAL HEALTH CHECK-IN

POINTS OF REFLECTION

15-21	22-28	29-35
PLANTING SEEDS	**GAINING MOMENTUM**	**STANDING STRONG**
Forward only! Leave financial uncertainty in the dust by building and following a consistent plan.	**Don't stop! Fill the gap where so many hold the reigns of wealth mentality just a bit too loose.**	**Keep that ownership mindset and consider helping others. Don't change what's working.**

Below 14?

Don't panic. STRATEGIZE.
Waiting for the "right time" to learn is not helping you.
Learn, protect, preserve, build, learn some more.

READY FOR THE NEXT STEP?

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