



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.

	<b>Yes</b>	<b>No</b>
1. Do you feel like you are 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"/>	<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"/>

