

# New Money Questionnaire

Read the questions for insight into your personal finances.

1. DO YOU ENJOY YOUR WORK?
2. DO YOU VISUALIZE YOURSELF ACHIEVING SOMETHING BIGGER THAN WHAT YOU ARE CURRENTLY DOING?
3. DO YOU SAVE MONEY EVERY MONTH?
4. DO YOU INVEST AT LEAST SOME OF YOUR MONEY DIRECTLY IN THE STOCK MARKET EITHER THROUGH MUTUAL FUNDS, 401(K), OR INDIVIDUAL STOCKS?
5. DO YOU SHOP BEFORE YOU BUY MOST ITEMS, ESPECIALLY BIG-TICKET ITEMS?
6. DO YOU TAKE CARE OF YOUR HOME OR APARTMENT, PERFORMING REGULAR MAINTENANCE, AS WELL AS REPAIRS?
7. DO YOU PERFORM REGULAR MAINTENANCE ON YOUR CAR AND OTHER EXPENSIVE ITEMS?
8. DO YOU PAY OFF YOUR CREDIT CARDS EACH MONTH?
9. ARE YOU COMFORTABLE BUYING USED BIG-TICKET ITEMS SUCH AS CARS AND APPLIANCES?
10. HAVE YOU EVER STARTED YOUR OWN BUSINESS?
11. DO YOU HAVE INSURANCE PROTECTION FOR YOUR FAMILY MEMBERS AND /OR BUSINESS?
12. HAVE YOU EVER ESTIMATED HOW MUCH MONEY YOU WOULD NEED TO PRODUCE ENOUGH INCOME TO COVER YOUR CURRENT EXPENSES?
13. DO YOU MEASURE THE PERFORMANCE RESULTS OF YOUR PORTFOLIO AT LEAST YEARLY?
14. DO YOU MAXIMIZE CONTRIBUTIONS TO RETIREMENT PLANS SUCH AS 401(K) OR IRA?
15. IS YOUR MORTGAGE PAYMENT/RENT PAYMENT MORE THAN 20% OF YOUR MONTHLY INCOME?
16. DO YOU SPEND LESS THAN YOU MAKE?
17. HAVE YOU EVER READ BOOKS ON BUILDING WEALTH, OR AN AUTOBIOGRAPHY OF SOMEONE WHO IS WEALTHY?
18. DO YOU OWN A BUSINESS NOW THAT PRODUCES A POSITIVE NET INCOME?
19. HAVE YOU EVER WORKED ALL NIGHT OR MORE THAN 24 HOURS ON A PROJECT?
20. DO YOU PAY YOUR TAXES ON TIME EVERY YEAR?

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