



Ask Yourself...What Needs My Attention Right Now To Help Enhance My Financial Situation?

Directions: Please number each of the following statements on a scale from 1 through 5; using the column on the left.

1 = Strongly Agree 2 = Somewhat Agree 3 = Not Sure 4 = Somewhat Disagree 5 = Strongly Disagree

1 - 5	
	My/Our current investment strategy is taking me closer to my financial objectives
	I/We are optimistic about the future
	I/We are currently accomplishing all our financial goals
	I/We find it easy to make financial decisions
	I/We have had good experiences with Financial Advisors in the past
	I/We make financial decisions comfortably and quickly
	I/We always follow a budget
	I/We frequently worry about outliving my/our money in retirement
	I/We check our retirement portfolio on a frequent basis
	I/We would rather work longer than reduce standard of living in retirement
	I/We are the ultimate decision maker(s) when it comes to financial decisions
	I/We have had great examples of money management in my lifetime
	I/We feel comfortable picking my/our own investments
	I/We have the emotional fortitude to stick with my financial goals and objectives during volatile market conditions
	I/We feel our assets are properly and prudently allocated for my objectives and risk tolerance
	I/We make spontaneous decisions and enjoy taking risks
	I/We like predictability and routines in my daily life
	I/We feel the cost of investing is a concern
	I/We feel it is important to leave an inheritance or financial legacy
	I/We feel it is important to save for our children's educational expenses

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