



Financial Fitness Questionnaire *

We believe that everyone has a relationship with money in the same way we have a relationship with food (do you predominately eat apples or chips?), ourselves (do you like yourself or would prefer to be someone else?) and each other (do you listen carefully to your partner/spouse/child in order to enhance your understanding of you and your life or, do you wish they would just listen to you because you are, after all, right!). In other words, are you aware of, when it comes to money, what's coming in the door, going out the door and how best to allocate your funds to maximize those hard earned dollars?

Below please find a Financial Fitness Questionnaire to see how healthy your relationship is with money. Your answers are on a scale of 1 to 5. Circle the response that best fits you and add the total at the end of the questionnaire.

1. *Do you have a budget?*

1	3	5
It's all a mystery to me I think it's balanced	I think it's balanced	I know what's coming in, what's going out and have sufficient funds to meet my short, medium and long term goals.

2. *Do you have an emergency fund/cash buffer in place?*

1	3	5
Are you kidding me? Isn't that what my line of credit is for?	I am aware of it's importance, just can't figure out where to get the \$\$	I am currently working towards having 3X my monthly expenses in place, set up in a separate high interest savings account.

3. *How I feel about \$\$*

1	3	5
I hate it, and it scares me!	It's a challenge but I'm trying to get a grip on it.	Me and \$\$ - we're happy together!

4. *If I were to become disabled, critically ill or were (heaven forbid) to die, the following would happen :*

1	3	5
Who cares	I've been wondering about this & have some insurance in place, I just don't know the details	My family would be okay, as would I if I'm disabled or critically ill.

5. *In terms of Investments:*

1	3	5
I have none	I have no idea where my \$\$ is invested	I am diversified well & understand what that means.



Financial Fitness Questionnaire Continued

6. *Financial Planning is:*

1	3	5
Only for rich people	A method to help me make \$\$ on my investments	A road map to reaching all of my life goals

7. *Financial Planners are:*

1	3	5
Evil & all into Ponzi schemes	I don't know	There to make my Dreams a Reality

8. *My Will(s) and Powers of Attorney are current :*

1	3	5
I'd rather not think about my mortality	As far as I know they are	I review/update my Will every 5 years or whenever there are any significant changes in my life.

9. *When it comes to income taxes I:*

1	3	5
Haven't had them done for years	Hate doing them but give it my best shot	Have a strategy in place to minimize my tax liability both now and at my death

10. *Learning about money and investments is fun and interesting :*

1	3	5
What planet are you on?	I try my best but honestly it's rather boring and confusing	Bring it on, I love it! The more I learn and have the opportunities to learn, the happier I am

Your Score

10-20 = Have you ever thought about seeing a Financial Planner?

21-40 = Have you ever thought about seeing a Financial Planner?

41-50 = Ever thought about a career change and becoming a Financial Planner

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