

Financially Fit Check-Up

Please read the following 10 statements. Answer “true” or “false” as appropriate for you.

- | | T | F |
|---|-------|-------|
| 1. I have enough money to buy, do or achieve the things I want. | _____ | _____ |
| 2. I know exactly how much debt I owe and how much it costs me each month/year in interest. | _____ | _____ |
| 3. I never worry about bills. | _____ | _____ |
| 4. I feel financially secure. | _____ | _____ |
| 5. I have a written financial plan. | _____ | _____ |
| 6. I have an updated will. | _____ | _____ |
| 7. I know that I have adequate life and disability insurance. | _____ | _____ |
| 8. I have an emergency cash cushion of at least 3 months’ expenses. | _____ | _____ |
| 9. I have a very clear idea about where my money goes each month. | _____ | _____ |
| 10. I feel confident about my money-management knowledge/skills. | _____ | _____ |

