

**SPIRITUS FINANCIAL PLANNING**



**FINANCIAL  
LIFE  
CHECKUP**

# FINANCIAL LIFE CHECKUP

The following statements will help you assess how satisfied you are with many aspects of your life

Not Satisfied		Moderately Satisfied		Very Satisfied
1	2	3	4	5

I am satisfied...

Client

Partner/Spouse

With my ability to meet my financial obligations	_____	_____
With the income potential my job or career provides me	_____	_____
With my spending habits	_____	_____
With the level of debt I carry	_____	_____
With the amount of money that I save and invest on a regular basis	_____	_____
With my current investment choices	_____	_____
That I am on track to build a sufficient retirement nest egg	_____	_____
With my style of personal bookkeeping & financial records management	_____	_____
With the plans for my children's education	_____	_____
With my estate plan	_____	_____
With my level of charitable giving	_____	_____
With the level of personal financial education I have attained	_____	_____
With how I respond emotionally to personal finance issues	_____	_____
With my ability to communicate about my financial matters	_____	_____
That financial issues do not cause me stress in my personal relationships	_____	_____

Look over the values listed below. Throw away 10 of them, keep 5 and then rank in order of importance

	Client	Partner/Spouse
Achievement	_____	_____
Adventure	_____	_____
Arts and cultural events	_____	_____
Authority/power	_____	_____
Financial intelligence	_____	_____
Friendship/love	_____	_____
Health	_____	_____
Independence	_____	_____
Integrity	_____	_____
Philanthropy	_____	_____
Recreation	_____	_____
Service/volunteering	_____	_____
Spiritual growth	_____	_____
Wisdom	_____	_____
Work	_____	_____