

Confidential Financial Planning Questionnaire

Date: _____

Self Assessment

Please rate each statement by circling the most accurate number (1 = strongly disagree, 5 = strongly agree)

I/we follow a spending plan.	1	2	3	4	5
I/we avoid debt.	1	2	3	4	5
I/we save regularly.	1	2	3	4	5
I/we don't try to beat market returns.	1	2	3	4	5
I am/we feel well prepared for financial emergencies.	1	2	3	4	5
I/we have made arrangements for our survivors.	1	2	3	4	5
I/we understand how income taxes work.	1	2	3	4	5
I am/we are comfortable making financial decisions.	1	2	3	4	5
I/we want to learn more about personal finance.	1	2	3	4	5

Financial Resources and History

Please check all that apply.

<input type="checkbox"/> Pension benefits	<input type="checkbox"/> Social Security benefits
<input type="checkbox"/> Employer matches retirement contributions	<input type="checkbox"/> Current estate planning documents
<input type="checkbox"/> Stock option grants	<input type="checkbox"/> Typically receive income tax refunds
<input type="checkbox"/> Flexible spending accounts	<input type="checkbox"/> Typically owe additional income tax
<input type="checkbox"/> Health savings accounts	<input type="checkbox"/> Divorced/Widowed
<input type="checkbox"/> Health insurance coverage	<input type="checkbox"/> Children outside the household
<input type="checkbox"/> Term life insurance	<input type="checkbox"/> Viewed credit reports recently
<input type="checkbox"/> Permanent life insurance	<input type="checkbox"/> Identify theft victim
<input type="checkbox"/> Long-term care insurance	<input type="checkbox"/> Behind on mortgage payments
<input type="checkbox"/> Renter's insurance	<input type="checkbox"/> Mortgage modification
<input type="checkbox"/> Homeowner's insurance	<input type="checkbox"/> Foreclosure
<input type="checkbox"/> Umbrella liability insurance	<input type="checkbox"/> Bankruptcy
<input type="checkbox"/> College funding	<input type="checkbox"/> Turned down for insurance

Additional Comments

Please share any additional information that you think may be relevant to your financial situation or plans.

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