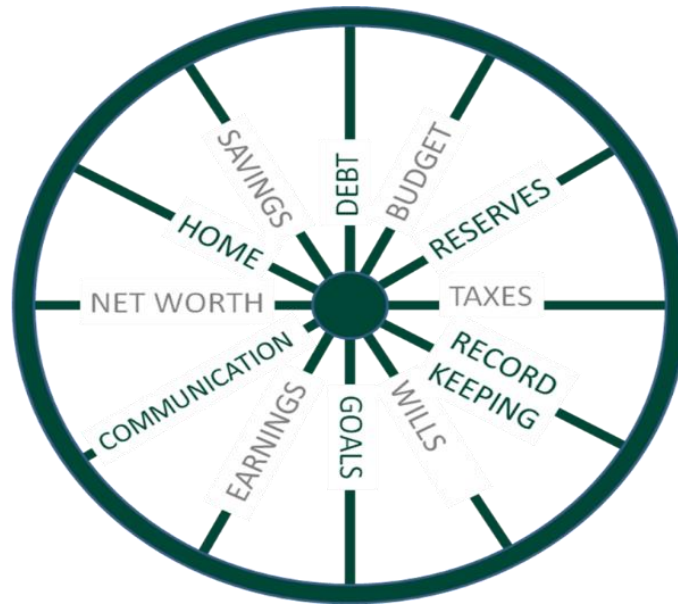




FOG CITY ADVISORS, LLC

Are You Getting Where You Want to Go? Evaluate Your Financial Fitness



- Each spoke is vital to the stability of a wheel.
- Your destination is financial independence; you need a structurally sound wheel.
- Evaluate these 12 true/false statements to determine the stability of your Financial Fitness wheel.
- A "false" response to any statement indicates a damaged or missing spoke that may impede your progress.

True

False

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | I have no credit card or short-term debt. |
| <input type="checkbox"/> | <input type="checkbox"/> | I live within my means. |
| <input type="checkbox"/> | <input type="checkbox"/> | I have six months of living expenses in reserve. |
| <input type="checkbox"/> | <input type="checkbox"/> | I pay only the taxes that I am legally obligated to pay. |
| <input type="checkbox"/> | <input type="checkbox"/> | I have written short- and long-term goals. |
| <input type="checkbox"/> | <input type="checkbox"/> | I have a will (or trust) that is up to date. |
| <input type="checkbox"/> | <input type="checkbox"/> | I have a record-keeping system and I can find what I need when I need it. |
| <input type="checkbox"/> | <input type="checkbox"/> | I am earning up to my potential in a career I enjoy. |
| <input type="checkbox"/> | <input type="checkbox"/> | I easily communicate with loved ones about money issues. |
| <input type="checkbox"/> | <input type="checkbox"/> | I know my financial net worth. |
| <input type="checkbox"/> | <input type="checkbox"/> | My home is an integral part of my overall investment strategy. |