

# Financial Bridges

## Self Assessment

Tick answer for points

| Point Values                         | 5           | 4           | 3          | 2            | 1          |
|--------------------------------------|-------------|-------------|------------|--------------|------------|
| Spending less than you make          | Lot less    | Some less   | Even       | Not too good | Bad        |
| Financial Goals Defined/Quantified   | Exact       | Pretty Good | So so      | Not Well     | None       |
| Emergency Fund Ready                 | Fully       | Almost      | On the way | A little     | Not at All |
| Ins. Auto/Home/EQ/Life/Dis./Health   | Up to date  | Close       | Kinda      | Not really   | No         |
| Tax return filed on time             | Always      | Mostly      | So so      | Not usually  | Never      |
| Wills, POA Current                   | Fully       | Pretty Good | So so      | Not really   | No         |
| Investments Tracked/Evaluated        | Once a Year | Quarterly   | As needed  | Not really   | Never      |
| Identity Theft Prevention in Place   | All Avenues | Most Places | Some       | Not many     | Nope       |
| Disaster Plan: Physical and Digital  | Ready to Go | Mostly      | Kinda      | Not really   | No         |
| Personal Financial Statement         | Up to date  | Close       | Kinda      | Not really   | Never      |
| Budget with income and expenses      | Always      | Mostly      | Kinda      | Not really   | Never      |
| Partner/Spouse Informed Fin. Affairs | Always      | Mostly      | So so      | Not really   | Never      |

| Answers per column |  |  |  |  |  | TOTAL |
|--------------------|--|--|--|--|--|-------|
| Points             |  |  |  |  |  |       |

|      |  |
|------|--|
| Name |  |
| Date |  |

|         |              |
|---------|--------------|
| Perfect | 55-60        |
| Good    | 45-54        |
| Fair    | 34-44        |
| Trouble | 33 and below |