

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