



- 36. that I have identified my long term and short-term goals _____
- 37. that there are things in my life that I am passionate about _____
- 38. with my overall health and physical well being _____
- 39. with the environment where I live, work, and play _____
- 40. with my investment in myself _____
- 41. with the balance in my life _____
- 42. with the time I take for myself, my family and friends _____
- 43. with my community and social network _____
- 44. with my overall financial well-being and personal satisfaction _____
- 45. with my discipline to do the financial things I know need to be done _____
- 46. with what I have accomplished so far _____
- 47. that I am better off this year compared to last year _____
- 48. that financial issues do not strain my relationships _____
- 49. with the way I keep my financial records _____
- 50. with my technology _____
- 51. with my progress toward simplifying my life _____
- 52. with how I feel about money _____
- 53. with the progress towards my life-time goals _____

Here are my concerns:
