

YOUR FINANCIAL JOURNAL

UNDERSTANDING YOUR GOALS

Please react to the following statements:

	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE
I feel like I have a good sense of where my money is going.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel like my money goes towards things that are meaningful to me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like to develop better savings habits.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like to plan beyond my month-to-month expenses.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like to find ways for my debt to be less of a burden.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel like I have a good understanding of money-related topics.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To start reflecting on what you want to accomplish with your money, please answer the following questions:

01

Who are the people that you would like to interact with to make better financial decisions?

- Spouse/Partner
- Parent
- Other family member
- Other(s):
- Professional Adviser
- Child
- Friend(s)

02

How many months of expenses have you saved?

- 0–1 months
- 2–3 months
- 4–6 months
- 6+ months

03

Please identify the top 2 to 3 savings goals that you have:

- Education
- Home purchase
- Home improvement
- Retirement
- Vacation
- Emergencies
- Other(s):

04

Please select one of the following:

- I have not saved enough
- I have more than enough saved
- I have just enough saved
- I do not see value in saving

05

Please “score” your current credit confidence by reacting to the following statement:
I’m confident in my knowledge of credit and how to use it wisely to build my wealth.

- Strongly disagree
- Agree
- Disagree
- Strongly agree

**NOW THAT YOU
KNOW WHERE
YOU ARE, MAKE
A PLAN FOR
WHERE YOU
WANT TO GO!**

