



General Information

Name

Date of Birth Ethnicity

Region (Zip Code) Income

Married Children

The Financial Body (FinBod) is driven by both psychological (mind) and physiological (body) factors.

The 33 Questions below can determine how you feel about your Personal Finances. This "FeelScore" combined with your "FinScore" will provide an overall FinBod Score. Your FinBod Score gives you a snapshot of your Personal Financial health.

33 Feelings Questions

1 - not content
5 - very content

| | | | | | | |
|------------------------------------|---------------------|---|---|---|---|---|
| How important is money to you? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How well do you manage your money? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How well do you SPEND? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How well do you SAVE? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How well do you INVEST? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How well do you GIVE? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |

| | | | | | | |
|---|----------------------------|---|----|---|---|---|
| Who do you turn for financial advice? | Parents | | | | | |
| | Friends | | | | | |
| | Co-Workers | | | | | |
| | Advisor | | | | | |
| Have you ever received Financial Literacy in school? | Yes | | No | | | |
| How do you feel about your current financial situation? | 1 | 2 | 3 | 4 | 5 | |
| How do you feel about your ability to retire comfortably? | 1 | 2 | 3 | 4 | 5 | |
| How often do you exercise? | 1 - not often 5 - often | 1 | 2 | 3 | 4 | 5 |
| Who do you turn to for Health Advice? | Parents | | | | | |
| | Friends | | | | | |
| | Co-Workers | | | | | |
| | Physician | | | | | |
| Do you believe your finances and health are related? | 1 | 2 | 3 | 4 | 5 | |
| Do you believe in your financial decisions are driven by your emotions? | 1 | 2 | 3 | 4 | 5 | |
| Does managing your finances make you anxious? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How important is it for your extended family (spouse, kids, etc) to make smart financial choices? | 1 | 2 | 3 | 4 | 5 | |
| How important is a budget for monthly expenses? | 1 | 2 | 3 | 4 | 5 | |
| Will you receive a pension when you retire? | Yes | | No | | | |
| Most people you know live "paycheck to paycheck"? | 1 | 2 | 3 | 4 | 5 | |
| Investing comes in many forms, which do you feel is the best way to invest your money? | Stocks/Bonds | | | | | |
| | Land/Buildings | | | | | |
| | Private Business | | | | | |
| | Gold/Commodities | | | | | |

| | | | | | | |
|--|---|---|---|---|---|---|
| Does your budget affect your ability to reach your financial goals? | 1 | 2 | 3 | 4 | 5 | |
| How do you feel about your current ability to reach your short term life goals? | 1 | 2 | 3 | 4 | 5 | |
| When do you believe is the best time in life to start learning about money management? | Elementary school High school College Early career | | | | | |
| What dollar amount would you need before you decided you needed a financial advisor | \$10,000 \$100,000 \$500,000 \$1,000,000 | | | | | |
| How important is it to discuss your personal finances with your family? | 1 - not 5 - very | 1 | 2 | 3 | 4 | 5 |
| How far ahead do you plan your financial future? | 1 year 3 years 5 years 10 years | | | | | |
| Do you have a consistent process in place to measure your financial success over time? | 1 | 2 | 3 | 4 | 5 | |
| Do you feel that you have full control over your financial destiny? | 1 | 2 | 3 | 4 | 5 | |
| What does money give you? | Choices Power Stress Independence | | | | | |
| When faced with a big financial decision, what is your first reaction? | Analyze Act Wait Ignore | | | | | |

Do you have written goals you'd like to achieve during your lifetime?

Yes

No

Which animal best describes how you handle money?

Hawk

Elephant

Cheetah

Ostrich

Complete this phrase: "Money makes me _____"

Happy

Anxious

Money

Powerful

BONUS

Are you familiar with the "Rule 72" for rates of return on money?

Yes

No

Are you familiar with the concept of "Compound Interest"?

Yes

No

FinScore

Your FinScore gives you an idea of the balance in your personal finances. The critical factors combines with your "FeelScore" will provide your overall "FinBod" score.

Assets

Hard Assets

Home _____
 Auto _____
 Land _____
 Properties _____
 Business _____
Total: _____

Liquid Assets

Cash _____
 Investments _____
 IRA _____
 401k _____
 Annuities _____
 Pension _____
 Insurance _____
Total: _____

Income (Annual)

Earned income _____
 Passive income _____
 Business income _____
 Investment Income _____
 Alimony / Support _____
 Social Security _____
Total: _____

Liabilities

Mortgage _____
 Home equity _____
 Credit Cards _____
 Auto Loan _____
 Personal Loans _____
Total: _____

Expenses (Annual)

Needs

Mortgage/Rent _____
 Auto _____
 Food _____
 Utilities _____

Wants

Entertainment _____
 Travel _____

Wishes

Vacations _____
 Gifts _____
 Large purchases _____

Total: _____