



Please answer for yourself and if in a relationship, have your partner complete a separate one.

The scale: 1 is This describes me, I'm great in this area. 5 means this is NOT ME but I wish it was!

### Spending

- 1 2 3 4 5 I am confident that I can pay my monthly bills.
- 1 2 3 4 5 I am satisfied with how I spend my money
- 1 2 3 4 5 I have the resources to meet non- routine expenses such as medical copays, new tires, gifts, home repairs, etc. without use of debt unless it exceeds \$2000.
- 1 2 3 4 5 I am saving for upcoming expenses such as vacations, repairs, etc.so I can meet those non-routine expenses.

### Debt

- 1 2 3 4 5 I believe that I have an efficient and effective debt reduction plan
- 1 2 3 4 5 I have a good credit score and am happy with my interest rates

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1 2 3 4 5 I am using debt effectively such as for homes or major purchases such as cars vs. routine expenses.

1 2 3 4 5 I will have all my debt including my mortgage paid off by my retirement date.

## Management

1 2 3 4 5 I attend to my bills and financial tasks in a timely manner

1 2 3 4 5 I am knowledgeable and effective or have resources I can trust in evaluating financial issues as comparing insurance, selecting benefits, refinancing decisions, etc.

1 2 3 4 5 My paperwork is organized and available to my executor/financial power of attorney

1 2 3 4 5 I have appropriate legal documents reviewed within 5 years

## The Future

1 2 3 4 5 I have at least 3 months of expenses in reserves

1 2 3 4 5 I am saving adequately for retirement and monitor my projections routinely

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1 2 3 4 5 I am saving adequately to achieve my financial goals such as funding education, home repairs or purchase, cars, etc.

## Risk Management

1 2 3 4 5 I am adequately protected for medical costs including long term care

1 2 3 4 5 I am adequately protected in case of a short or long-term disability of myself or a partner

1 2 3 4 5 I am adequately protected in case of a death so others will not suffer.

1 2 3 4 5 I am adequately protected in case of the death of a partner/parent/other.

1 2 3 4 5 I am adequately protected from loss of property or lawsuits

## Overall Satisfaction/Stress

1 2 3 4 5 I am satisfied with what I am getting from my money and labor.

1 2 3 4 5 I am confident that I can achieve my goals barring unusual circumstances

1 2 3 4 5 Worry about financial issues is infrequent. I feel in control of my financial life

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1 2 3 4 5 I do not have any concerns that the financial situation of others I love will significantly impact me.

1 2 3 4 5 I am comfortable with the amount of time that I spend on managing my finances

## If in a Partnership

1 2 3 4 5 My partner and I are both aware of the details of our financial situation.

1 2 3 4 5 Either of us could manage the day to day financial activities

1 2 3 4 5 We are in agreement on spending

1 2 3 4 5 We are in agreement on our financial priorities

1 2 3 4 5 Financial issues are not impacting our relationship



## Quiz Score:

**0 – 24 Major tasks that impact your financial security and success are not being addressed satisfactorily.** Whether it's lack of knowledge, lack of resources, lack of time or lack of desire, you have something that is blocking you from "taking care of business" which can lead to real financial problems at some point. We can help you figure out ways around your stumbling blocks to taking control of your financial life and prevent future problems.

**24 – 47 Some of the major tasks are not being addressed.** You have some positive habits and are addressing many of your important tasks. However, you recognize that some of your tasks aren't getting addressed or they are taking too much time. We may be able to help you quickly get on top of those tasks that are not being accomplished efficiently.

**48 – 60 You know what to do and most likely have the skills and discipline to complete the tasks.** A personalized financial plan will help you see if you are on track to meet your future goals and identify any risk management gaps you may have. Even if you have an investment manager, they may not be look at all these areas. Set up a consultation if you would like to discuss whether we can help you streamline the time it takes to stay on top of your money or have a professional review your work.

Everybody has some areas of their financial lives that work really well, but sometimes there are areas that aren't getting addressed. You may have some tasks you either don't know how to do, don't like doing or both! Our program makes it easier and typically takes less time because everything you need is included! The goal is to help you take control of your money... which means getting on top of the tasks that will improve your financial fitness. **We do not sell any products or manage money.** We strictly help you learn and take control of your finances under the fiduciary standard.