

Financial Snapshot

Answer each question using a scale of 1 to 10 based on where you are today compared to where you would like to be if everything was ideal in your life.

1 = Far from Ideal 10 = Ideal

1 I work when I want with whom I want?

1 2 3 4 5 6 7 8 9 10

2 I make choices of what I want to buy based on preference and not on price?

1 2 3 4 5 6 7 8 9 10

3 I spend time doing the things I love as often as I want?

1 2 3 4 5 6 7 8 9 10

4 I feel fulfilled with my occupation and look forward to going to work?

1 2 3 4 5 6 7 8 9 10

5 I give creative input and work and feel appreciated for it?

1 2 3 4 5 6 7 8 9 10

6 I get to be at all important life events of the people I care about?

1 2 3 4 5 6 7 8 9 10

Your Score = ____/120

Date _____

7 I have control over how much I get paid and for what I am worth

1 2 3 4 5 6 7 8 9 10

8 I live where I want?

1 2 3 4 5 6 7 8 9 10

9 I drive the vehicle I want?

1 2 3 4 5 6 7 8 9 10

10 I travel when and where I want?

1 2 3 4 5 6 7 8 9 10

11 I can give to worthy causes when I want for the amount I want?

1 2 3 4 5 6 7 8 9 10

12 I am able to keep my current lifestyle without financial stress if I didn't go to work for 6 months?

1 2 3 4 5 6 7 8 9 10