

Do you have a  **SOLID FINANCIAL FOUNDATION?**

Knowing where you stand today helps you learn where to go tomorrow. Before you start planning, use our questionnaire to get a better understanding of your current financial situation.

1. Do you know how much do you earn, spend, and save each month?

Yes No

Take Home Pay

Average Spending

Average Savings

2. Do you have three to six months of savings to cover your living expenses in an emergency?

Yes No

Current Emergency Fund

3. Do you have credit card debt, student loans, or any other type of debt?

Yes No

Credit Cards

Student Loans

Other

4. Do you know your credit score?

Yes No

Credit Score

5. Are you saving for retirement, using an employer's retirement plan or an Individual Retirement Account (IRA)?

Yes No

Current Balance

6. Do you have a risk management plan in place (life insurance, health insurance, disability, etc.)?

Yes No

7. Do you have a will and health care proxy?

Yes No



**Financial wellbeing starts with knowledge you can trust.
For more than 170 years, we've been guided by a single purpose:
to help people secure their future and protect the ones they love.**

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