

# FINANCIAL ASSESSMENT

***Please complete this form for yourself. If you are part of a couple, please have the other person complete the next form entitled "Family Member" and have it returned to you.***

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	I am starting to develop an up-to-date financial plan.
<input type="checkbox"/>	<input type="checkbox"/>	I have an updated financial plan.
<input type="checkbox"/>	<input type="checkbox"/>	I have analyzed my cash flow.
<input type="checkbox"/>	<input type="checkbox"/>	I have established a "rainy day" fund for emergencies.
<input type="checkbox"/>	<input type="checkbox"/>	I have completed a net worth statement. (Assets minus debts or liabilities)
<input type="checkbox"/>	<input type="checkbox"/>	I am saving money on a regular basis for the future.
<input type="checkbox"/>	<input type="checkbox"/>	I have reviewed my (life, health, disability, long term care, auto, home, liability) insurance coverage.
<input type="checkbox"/>	<input type="checkbox"/>	I have a national credit card in my own name.
<input type="checkbox"/>	<input type="checkbox"/>	I have discussed finances with appropriate family members.
<input type="checkbox"/>	<input type="checkbox"/>	I have documents pertaining to my personal and family finances where my family can find them (property deeds, automobile titles, wills, insurance policies, birth, investment, marriage and divorce certificates, etc.).
<input type="checkbox"/>	<input type="checkbox"/>	I know approximately what my financial situation would be in the event of a significant life event or change.
<input type="checkbox"/>	<input type="checkbox"/>	If I should die suddenly, it would be easy for my survivors to determine who should be notified.
<input type="checkbox"/>	<input type="checkbox"/>	If I should die suddenly, it would be easy for my survivors to understand their total financial picture.
<input type="checkbox"/>	<input type="checkbox"/>	I know my retirement benefits.
<input type="checkbox"/>	<input type="checkbox"/>	I know approximately what my Social Security income will be in retirement.
<input type="checkbox"/>	<input type="checkbox"/>	I know approximately the future income from my investments in retirement.
<input type="checkbox"/>	<input type="checkbox"/>	I have authorized another person to act on my behalf under "power of attorney" document and living will.
<input type="checkbox"/>	<input type="checkbox"/>	I have an up-to-date will.