

Financial Satisfaction Thoughtlist

Name _____

Date _____

Directions: The statements below will help you to think about and assess how satisfied you are with these aspects of your life. It is a starting point for your thoughts and for our conversation when we get together.

Not Satisfied	2	Moderately Satisfied	4	Very Satisfied
1		3		5

I am satisfied.....	Score
...with my ability to meet my financial obligations.	
...with the income potential my current job or career provides me.	
...with my spending habits.	
...with the level of debt I carry.	
...that my current financial decisions align with what I value.	
...with the "extras" that I am able to buy for myself and/or loved ones.	
...with the level and quality of insurance protection I currently have.	
...with the amount of money that I save and invest on a regular basis.	
...with my current investment choices.	
...with the level of employee benefits I receive.	
...that I am on track to build a sufficient retirement nest egg.	
...with my style of personal bookkeeping and financial records management.	
...with my plans for my children's education.	
...with my estate plan.	
...with my level of charitable giving.	
...with the level of personal financial education I have attained.	
...with how I respond emotionally to my personal finance issues.	
...with my ability to communicate about my financial matters.	
...with the feelings I have about my relationship with money.	
...that financial issues do not cause stress or strain in the relationships that are important to me.	
...with the working relationships I have with my financial service providers (i.e., insurance agent, banker, financial planner, broker, and accountant)	



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Checklist Adapted from "Financial Planning: The Next Step", Roy T. Diliberto, CFP®, FPA Press © 2006