

FISCAL CHECKUP

YES=3 points SOMEWHAT=2 points MINIMAL=1 point NO =0 points

1. Do you have written goals and objectives for yourself that are consistent with your core values?

2. Do you have written goals and objectives for your family that are consistent with your core values?

3. Have you and your spouse reviewed your insurance coverage within the last year? Have you considered health insurance, life insurance and disability insurance?

4. Have you considered long-term care insurance?

5. Are you accumulating or saving enough money to allow for retirement?

6. Do you have a debt reduction plan?

7. Are you participating in an individual or company retirement plan such as a 401(k), profit sharing plan, Simple plan, IRA, SEP, or a Roth nondeductible IRA?

8. Are your wills, powers of attorney, living trusts, etc., for your estate current?

Add your score

20 or more points

Your financial household is in good order.

12 to 19 points

Your financial house needs some attention

11 or less points

You need to make an appointment to see a professional financial advisor.