Financial Satisfaction Survey

Name _____ Date _____

Directions: The statements below will help you to think about and assess how satisfied you are with many aspects of your financial life. Select and record your level of satisfaction for each statement. Add the numbers and record the total.

Not Satisfied		Moderately Satisfied		Very Satisfied
1	2	3	4	5

	I am satisfied ...	
1	...with my ability to meet my financial obligations.	
2	...with the income my current job or career provides me.	
3	...with my spending habits.	
4	...with the level of debt I carry.	
5	...with the "extras" that I am able to buy for myself and/or loved ones.	
6	...with the level and quality of insurance protection I currently have.	
7	...with the amount of money that I save and invest on a regular basis.	
8	...with my current investment choices.	
9	...that I am on track to build a sufficient retirement nest egg.	
10	...with the level of employee benefits I receive.	
11	...with my style of personal bookeeping and financial record management.	
12	...with my ability to provide financial help to family members.	
13	...with my estate plan.	
14	...with my level of charitable giving.	
15	...with the level of financial education I have attained.	
16	...with how I respond emotionally to my personal finance issues.	
17	...with my ability to communicate about my financial matters.	
18	...with the feelings I have about my money life.	
19	...that financial issues do not cause stress or strain in the relationships that are important to me.	
20	...with the working relationships I have with my financial service providers (i.e., insurance agent, banker, broker, financial planner, accountant).	
	Maximum Financial Satisfaction Survey Score = 100 **Total**	

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