

Client Self Assessment – The Big Picture

True financial success comes from using your resources (time, energy, assets) to enhance the things you value most. Without defining what is important to you, it is difficult to measure success. In order to define what is important, one must step back from a busy schedule and reflect on what truly matters most. One must answer: What people, organizations, and things do care about the most in your life? What impact do you want to have on the world and the things that matter the most? What are your core personal values?

This exercise is best completed with your spouse or significant other that contributes to your finances and financial decisions. It is also best that each complete the worksheet independent of each other and then discuss answers. This process will offer significant insights into what you jointly believe and desire. It will give you clarity that will help each of you make better financial choices.

1. What are the five most important things to us?

2. What is the purpose of my/our family?

3. What do I/we want to accomplish or build?

4. What talents and skills do I/we want to develop?

5. How would financial independence impact the goals listed above?

6. Imagine yourself accomplishing everything above...how would that make you feel?

7. To summarize this page, write 1-3 sentences that describe who you are and what matters most to you.

Client Self Assessment – The Details

In The Big Picture, you looked at the foundation pillars of how you define financial success and independence. Now you will get more specific. Below are 10 items that most people need to address during some period in their life. Some may have passed and some may yet happen but still answer them. If an item is not important to you then rank it at the bottom. (1 = most important, 10 = least important). Use the Rank column after you have answered all the questions

Money Issue	Yes	No	Not Sure	Rank
I have a cash reserve in the bank that will meet 3-6 months of expenses.				
I am comfortable with my current debt situation.				
I have enough assets (life insurance, savings, investments) so that my family could continue financially in the event of my death or the death of a spouse.				
I have a plan to pay for my children's/grandchildren's education.				
I understand how asset allocation, rebalancing, and dollar cost averaging can help me increase my return and lower my risk.				
I have a plan to choose, monitor and adjust my investments.				
I have a plan to create and pass on a legacy to my children and grand children.				
I am on track to achieve and/or maintain my retirement goals.				
I am happy with my current level of savings/investments.				
I have a written financial strategy that addresses the issues above.				
On a scale of 1-10 how do you feel about your overall financial situation?				

AchieveMore Retirement

285 E 950 South

Orem UT 84058

(801) 477-0444

Martin@AchieveMoreRetirement.com

www.AchieveMoreRetirement.com.

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