

Financial Assessment

Take a moment to answer each of the questions below by placing an "x" in the appropriate circle.

1

Do you have a written financial action plan that includes short and long-term goals?

YES

☐

KIND OF

☐

NOT YET

☐

2

Do you use a budget to manage money and track your income?

☐☐☐

3

Do you review credit reports every 4 to 6 months and understand how to establish and protect your credit?

☐☐☐

4

Do you feel in control of your debts?

☐☐☐

5

Do you know how different financial products work (bank accounts, credit cards, debit cards, loans)?

☐☐☐

6

Do you know which benefits, subsidies, and tax breaks you may qualify for?

☐☐☐

7

Do you regularly do something specific to nurture your financial future?

☐☐☐