

# FINANCIAL WELLNESS CHECKLIST



- 1) Am I conscious of my spending?  
Yes or No
- 2) Do I know the condition of my credit scores?  
Yes or No
- 3) Have I prepared an heritage for my children's, children?  
Yes or No
- 4) Do I have an executed estate plan?  
Yes or No
- 5) Do I have an emergency fund?  
Yes or No
- 6) Do I have a retirement plan in place?  
Yes or No
- 7) Do I pay credit card balances in full monthly?  
Yes or No
- 8) Do I communicate with my spouse about our finances?  
Yes or No
- 9) Do I have less than \$8k in credit card debt?  
Yes or No
- 10) Am I paying 36-43% or less of my income for housing?  
Yes or No

## HOW DO I RATE?

5-6 "YES's" = Good financial health

7-8 "YES's" = Very Good

9-10 "YES's" = Excellent

5 or more "NO's" = Fair financial health

6 or more "NO'S" = Need financial counseling  
and/or coaching

## ASSESSMENT RESULTS

"To Improve Your Financial Wellness"

Contact Us:

Website: [www.livemylifedebtfree.com](http://www.livemylifedebtfree.com) E-mail: [christineroebuck@livemylifedebtfree.com](mailto:christineroebuck@livemylifedebtfree.com)