

Are You Getting Where You Want to Go?

Evaluate Your Financial Fitness



Each spoke is vital to the stability of a wheel.

Your destination is financial independence; **you need a structurally sound wheel.**

Evaluate these twelve true/false statements to **determine the stability of your Financial Fitness wheel.**

A "false" response to any statement indicates a damaged or missing spoke that may impede your progress.

TRUE

FALSE

I have **NO** credit card or short term **DEBT**.

I **LIVE WITHIN MY MEANS**.

I have **SIX MONTHS OF** living expenses in **RESERVE**.

I pay **ONLY the TAXES** that I am legally obligated to pay.

I have **WRITTEN** short- and long-term **GOALS**.

I have a **WILL (or TRUST)** that is **UP TO DATE**.

I have a **RECORD KEEPING** system and **I CAN FIND** what I need **WHEN I NEED IT**.

I am **EARNING** up to my potential in **A CAREER I ENJOY**.

I easily **COMMUNICATE** with loved ones about money issues.

I know my financial **NET WORTH**.

My **HOME** is an integral part of my overall investment strategy.