

Financial Fitness Survey

Your responses to the following statements will help to identify the areas where assistance from a Certified Financial Planner[®] could be helpful. Please indicate your response to each statement where:

1 = Unsure or do not know; 2 = No (not true); 3 = Sometimes; 4 = Yes (that's me). *Leave blank if not applicable*

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
1. Quality of Life - I feel comfortable...				
with where I currently live				
with the level and regularity of my savings				
with my financial situation. It does not worry me.				
that my financial situation does not worry my spouse / partner				
with my spending habits				
with my spouse / partner / dependents spending habits				
that I pay off credit cards each month				
2. Retirement - I have...				
determined how much I need to save for a comfortable retirement				
determined when I can afford to retire				
defined goals for my retirement years				
prioritized those retirement goals				
3. Other life events - I currently have a plan on how to...				
purchase my next car without borrowing				
fund my childrens' education				
fund my grandchildrens' education				
help my family in ways I desire				
fund my childrens' weddings				
4. Investments - I am confident...				
my investments adequately reflect my risk tolerance / capacity				
my investments are properly diversified				
that I have a "plan" for my investments (Investment Policy Statement)				
I know how the costs and fees impact my portfolio's performance				
my portfolio has the highest return for the risk I am willing to take				
in the investing I have done to date				
that my values and life priorities are reflected in my investments				
5. Risks - I am <u>certain</u> that I am adequately protected...				
if my home were to burn to the ground				
if I were to be sued for a large liability				
if I became unable to work				
in the event of a health treatment costing \$3 million				
in case of a 4-year long-term care stay when I'm 80				
if I died prematurely, my family would be financially secure				
6. Estate Planning - I am certain that my current estate planning documents will:				
safeguard my minor children at my death				
minimize estate tax as much as legally possible				
not require modification when the Estate Tax laws change				
make it difficult to have my financial wishes be disputed by others				
keep estate administrative costs as low as possible				
make it easy for me to be cared for if I become incapacitated				
assure my life support decisions will be followed without a legal battle				

There is no official scoring for this survey. However, please note the number of statements you marked as 1, 2 or 3. The more scores in these categories, the more likely it is you would benefit from financial planning. Be sure to compare the results with your spouse / partner.

Please go to www.IntegratedFPS.com to learn more about financial planning and how you would benefit from using our services.

Please e-mail comments to John@IntegratedFPS.com

Name of Person Completing Form: _____

Date: _____