

Personal Financial Checkup

EMERGENCY FUND									
1	2	3	4	5	6	7	8	9	10
CREDIT CARD DEBIT									
1	2	3	4	5	6	7	8	9	10
HOUSEHOLD DEBT CONSUMPTION (ALL OTHER DEBT, LIKE LOANS AND STORE CARDS)									
1	2	3	4	5	6	7	8	9	10
HOUSEHOLD MORTGAGE DEBT (ANY LOAN TAKEN TO BUY A HOUSE)									
1	2	3	4	5	6	7	8	9	10
CREDIT HISTORY									
1	2	3	4	5	6	7	8	9	10
SAVINGS AND INVESTMENTS (INCL. STOCKS, BONDS, MUTUAL FUNDS)									
1	2	3	4	5	6	7	8	9	10
DEFINED RETIREMENT PLAN ATTRIBUTIONS (CAN BE "RA" OR PENSION PLAN)									
1	2	3	4	5	6	7	8	9	10
INSURANCES									
1	2	3	4	5	6	7	8	9	10
LONG-TERM ESTATE PLANNING									
1	2	3	4	5	6	7	8	9	10
WRITTEN FINANCIAL PLAN									
1	2	3	4	5	6	7	8	9	10

Any section < 5 - needs immediate attention

Any section > 8 - continue to do well

Total Score

> 75 - strong checkup, continue to monitor to ensure long-term success

35 to 75 - correct weakness soon

< 35 - start immediately to correct major weaknesses