

Financial FreedomTM Scorecard

Name _____ Date _____

To help you clearly understand your current situation, try The Financial Freedom ScorecardTM. Rate your reactions to each phrase. Decide where you lie on the scale from 1 to 10. Add up your total from each row, then total the score column to get your score. Speak to one of our Financial Advisors to understand the significance of your score.

We do not have a clear vision of our future	1	2	3	4	5	6	7	8	9	10	We have a clear, well-defined vision of our future
We do not have clear financial goals	1	2	3	4	5	6	7	8	9	10	We have clear financial goals
We do not have a strategy to achieve our goals	1	2	3	4	5	6	7	8	9	10	We have a strategy to achieve our goals
We do not have a step-by-step action plan to achieve our goals	1	2	3	4	5	6	7	8	9	10	We have a step-by-step action plan to achieve our goals
Our investments are scattered, disorganized and poorly mixed	1	2	3	4	5	6	7	8	9	10	Our investment portfolio is organized and properly diversified
We have not reviewed all of the tools which could help us achieve our vision	1	2	3	4	5	6	7	8	9	10	We have reviewed all of the tools which could help us achieve our vision
We do not have a plan to guard against losses from illness, disability or death	1	2	3	4	5	6	7	8	9	10	We have a plan to guard against losses from illness, disability or death
We do not review our vision, plan or progress on a regular basis	1	2	3	4	5	6	7	8	9	10	We review our vision, plan and progress on a regular basis
Our financial advisors work in isolation from each other	1	2	3	4	5	6	7	8	9	10	Our financial advisors work as a team to help us achieve our vision
We do not have as much confidence in the future as we would like	1	2	3	4	5	6	7	8	9	10	We have a strong sense of confidence about our future

Add Column Totals _____

Your Score _____