



# RIGHTPATH™

Investments & Financial Planning, Inc.

## Financial Satisfaction Survey

Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** The statements below will help you to think about and assess your satisfaction with many aspects of your financial life. Using the following scale, record your level of satisfaction for each statement and total the numbers for your score.

Not Satisfied		Moderately Satisfied		Very Satisfied
1	2	3	4	5

I am satisfied...	
1. ...with my ability to meet my financial obligations.	
2. ...with the income my current job or career provides me.	
3. ...with my spending habits.	
4. ...with the level of debt I carry.	
5. ...with the "extras" that I am able to buy for myself and/or loved ones.	
6. ...with the level and quality of insurance protection I currently have.	
7. ...with the amount of money that I save and invest on a regular basis.	
8. ...with my current investment choices.	
9. ...that I am on track to build a sufficient retirement nest egg.	
10. ...with the level of employee benefits I receive.	
11. ...with my style of personal bookkeeping and financial record management.	
12. ...with my ability to provide financial help to family members.	
13. ...with my estate plan.	
14. ...with my level of charitable giving.	
15. ...with the level of financial education I have attained.	
16. ...with how I respond emotionally to my personal finance issues.	
17. ...with my ability to communicate about my financial matters.	
18. ...with the feelings I have about my money life.	
19. ...that financial issues do not cause stress or strain in the relationships that are important to me.	
20. ...with the working relationships I have with my financial service providers (i.e., insurance agent, banker, broker, financial planner, accountant).	
<b>Maximum Financial Satisfaction Survey Score = 100</b>	<b>Total</b>

### What's Next?

Once you have completed these questions, take time to think about what your answers mean to you. Because RightPath Investments engages in the entire financial life planning process, we can help you with follow up analysis, as well as identify additional tools and steps appropriate to your situation. **Call us today for assistance with your planning.**