

Financial Awareness Keeps You Moving

Who makes up your Financial Team?

01. _____
02. _____
03. _____
04. _____
05. _____

- | | Yes | No |
|--|--------------------------|--------------------------|
| - Do you know your net worth? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Have you made a list of your assets? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Do you have a current budget? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Have you done an insurance needs analysis? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Do you have a cash flow analysis? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Do you have a current will/estate plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| - Do you have written financial goals? | <input type="checkbox"/> | <input type="checkbox"/> |

**If you've answered no or don't know the answers to any of these questions, then I suggest you contact your financial team to fill in the gaps for your financial success.*