

Part 1: How well does this statement describe you or your situation?

This statement describes me	Completely	Very well	Somewhat	Very little	Not at all
1. I could handle a major unexpected expense					
2. I am securing my financial future					
 Because of my money situation, I feel like I will never have the things I want in life 					
4. I can enjoy life because of the way I'm managing my money					
5. I am just getting by financially					
 I am concerned that the money I have or will save won't last 					

Part 2: How often does this statement apply to you?

This statement applies to me	Always	Often	Sometimes	Rarely	Never
 7. Giving a gift for a wedding, birthday or other occasion would put a strain on my finances for the month 					
8. I have money left over at the end of the month					
9. I am behind with my finances					
10. My finances control my life					

Part 3: Tell us about yourself.

11. How old are you?	□ 18-61 □ 62+	
12. How did you take the questionnaire?	\Box I read the questions	\Box Someone read the questions to me

https://www.consumerfinance.gov/consumer-tools/financial-well-being/



Flight Plan to Financial Freedom