

Satisfaction is defined as a feeling of fulfillment and contentment and is often dependent on one's definition of success. Therefore, evaluating your level of satisfaction with your financial life is much more of an emotional issue than a material one. Your sense of satisfaction is influenced heavily by your personal attitudes and beliefs.

Life Planning Program

Financial Satisfaction Survey

The degree to which you feel satisfied with your financial situation is based on a unique set of interpretations related to your personal financial needs and circumstances. By completing the survey below, we will be able to assess your current level of financial satisfaction and gain an understanding of the circumstances and behaviors that may be impeding your ability to achieve a high level of satisfaction.

Satisfaction scale

DISSATISFIED					HIGHLY SATISFIED				
1	2	3	4	5					

Please place a numerical value next to each aspect of your financial history, indicating your level of satisfaction.

Cash-Flow management

- _____ The income my current job or career provides me
- _____ My ability to meet my financial obligations
- _____ My spending habits
- _____ The spending habits of my family members
- _____ My current amount of and ability to manage debt
- _____ The existence of and amount of my emergency fund

Risk management

- _____ My ability to protect my current cash flow
- _____ My amount of life insurance coverage
- _____ My level of property and casualty insurance
- _____ My medical and disability insurance coverage

Asset management

- _____ The amount of money that I save and invest on a regular basis
- _____ My ability to meet my short-term financial goals (vacation, car, etc.)
- _____ My ability to meet my long-term financial goals (education, retirement, etc.)

Estate/Tax planning

- _____ My current financial plan
- _____ My plan for protection/transfer of my assets
- _____ My income/estate tax reduction strategy
- _____ My level of charitable giving

Qualitative issues

- _____ My response to difficult financial circumstances
- _____ My level of financial knowledge
- _____ The level of meaning my finances bring to my life

Discovery questions > Financial Satisfaction Survey

The following are some additional considerations to help you think about how you define wealth and happiness in your life.

1. I define success in my working life as:

2. I define success in my family life as:

3. I define success in my financial life as:

4. I define balance in my life as:
