

## Questionnaire

How Financially Organized am I?

YES/NO

1. Presently, I have a financial records system documenting my personal and family information.
2. I like my/our present system and I can personally access it, at any time, without any assistance.
3. It is up-to-date enough for everyday use in the event of an emergency.
4. My spouse is responsible for our records.
5. I take care of my own finances and my spouse takes care of his/hers. Everything is separate and we rarely feel the need to discuss it.
6. I know where all our records and important documents are located.
7. I know my basic Net Worth.
8. I know how much I spend annually and I know how much I need to live comfortably.
9. I have a living Will and an up-to-date Will
10. I have a good bill paying system and pay my bills on a timely basis.
11. I have capable professionals (lawyers, bankers, investment advisors, and accountants) handling everything so I don't need to have ready access to my personal financial records.
12. I am intimidated by some or all of my professional advisors.
13. Talking about money embarrasses me.
14. I am extremely reluctant to discuss my personal money matters with anyone.
15. When faced with a money problem, I feel utterly helpless and paralyzed.
16. Frankly, I don't care.