

Finance Questionnaire

Directions: Click the blanks to fill in the appropriate answers.

	Yes	No	N/A
1. Do you have a budget for your personal finances?	_____	_____	_____
2. Do you have the current years business financial projections?	_____	_____	_____
3. Do you use Quickbooks or Quicken to analyze your money?	_____	_____	_____
4. Do you have an organized file for all your paid receipts?	_____	_____	_____
5. Are you current on all Federal taxes?	_____	_____	_____
6. Are you current on all State taxes?	_____	_____	_____
7. Are you current on all property taxes?	_____	_____	_____
8. Do you have any credit card debt? (That is not paid off monthly.)	_____	_____	_____
9. Do you owe anyone any money?	_____	_____	_____
10. Do you have a savings account?	_____	_____	_____
11. Do you have an IRA?	_____	_____	_____
12. If you have an IRA is it fully funded?	_____	_____	_____
13. Do you have two months expenses in reserves?	_____	_____	_____
14. Do you own a home?	_____	_____	_____
15. Have you refinanced in past years?	_____	_____	_____
16. Do you plan on any large expenses in the future?	_____	_____	_____
A. College	_____	_____	_____
B. Weddings	_____	_____	_____
C. Purchases	_____	_____	_____
17. Is your automobile in excellent condition?	_____	_____	_____
18. Do you pay all of your bills on time?	_____	_____	_____
19. Do you have a current credit report?	_____	_____	_____
20. Do you have a current net worth statement?	_____	_____	_____
21. Do you reconcile your checking accounts monthly?	_____	_____	_____
22. Do you save 10% of what your earn?	_____	_____	_____
23. Do you take regular vacations?	_____	_____	_____
24. Are you working the amount of hours you want?	_____	_____	_____
25. Do you enjoy your work?	_____	_____	_____
26. Do you save money for vacations?	_____	_____	_____
27. Are you getting the best interest rates on your savings?	_____	_____	_____
28. Do you have investments?	_____	_____	_____
29. Are you getting the best return on your investments?	_____	_____	_____
30. Are you earning enough money?	_____	_____	_____
31. Do you have a plan to minimize taxes?	_____	_____	_____
32. Do you feel confident and comfortable about your finances?	_____	_____	_____
33. Do you have a retirement plan?	_____	_____	_____
34. When can you retire?	_____	_____	_____
35. How much per month will you have?	_____	_____	_____